

Our Financial Mission Statement

Joe and Sally Smith

March 1, 2021

We...(Names) both agree to purposefully live within or below our means and not to make any future purchases unless we can pay for it outright or with 0% interest. We also agree to work together to save at least _____ months of monthly expenses and to keep that as our emergency fund. We also agree to have a separate savings account to save for items such as travel, taxes, investments or any additional mutually agreed upon goals. We agree to discuss purchases larger than _____ must be mutually agreed upon. We also agree to meet monthly to check-in and review our progress. If there is any debt we agree to the following action plan _____

Signature:

Date

Signature

Date
