Monthly Money Date: 30-Minute Agenda

Use one page each month with your partner. Bring the shared information you agreed to review and last month's page, if available. Set a 30-minute timer and make brief notes. Either person may pass on a question or ask to pause. Revisit parked topics only by mutual agreement. An unresolved topic is not an agreement.

1. Before starting: Date and place. Who gathered the information, and who will take notes?

2. 0–3 minutes, settle in: Confirm today's topic. Each person may offer a word about how they are arriving or pass.

3. 3–10 minutes, look back: Last month's decision is done, in progress, changed, or no longer relevant. Note any follow-up.

4. Look back: Record something that worked and any unexpected shared expense. Do you expect that expense again?

5. 10–17 minutes, look ahead: List shared bills, renewals, events, and plans in the next 30 to 60 days. Label estimated amounts.

6. Look ahead: What information is missing? Who has agreed to find it, and by when?

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7. 17–24 minutes, one topic: Write the specific choice or question you are discussing.

8. Each person's aim: What would each of you like to get from this conversation?

9. Options: Note the possibilities you discussed and any questions still open.

10. 24–28 minutes, next step: Write the agreed action, or mark the topic unresolved.

11. Follow-through: Who has agreed to take the action, and by when?

12. Parking lot: Note any topics set aside. Revisit them only by mutual agreement.

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13. 28–30 minutes, close: Choose something enjoyable to do together. A no-cost plan counts.

14. Next date: Confirm the day and time. Add a next topic if you both want to choose one now.