

Kids and Money

Worksheet 1 – Child Worksheet

Item	Need	Want
TV 		
Food 		
Video Game 		
Clothes 		
Cell Phone 		
Teddy Bear 		
Candy 		
Water 		
Car 		



4300 Baker Road Minnetonka, MN 55343

P:763-231-9510

F:763-231-9520

Securities offered through Raymond James Financial Services, Inc. Member FINRA/SIPC. Investment advisory services offered through Raymond James Financial Services Advisors, Inc. Prosperwell Financial is not a registered broker/dealer, nor is it affiliated with Raymond James Financial Services.

Kids and Money

Worksheet 2 – Adult Worksheet

1. How were financial decisions made in your home:
2. What did you see adults doing with money? What did you hear them saying?
3. Did money ever create conflicts in your family? If so, how were those issues resolved?
4. What lessons did you learn about money from your childhood?
5. What is your favorite money memory?

Reflect on your Money Memories with your child based on their answers:

1. How are our experiences similar?
2. How are our experiences different?



4300 Baker Road Minnetonka, MN 55343

P:763-231-9510

F:763-231-9520

Securities offered through Raymond James Financial Services, Inc. Member FINRA/SIPC. Investment advisory services offered through Raymond James Financial Services Advisors, Inc. Prosperwell Financial is not a registered broker/dealer, nor is it affiliated with Raymond James Financial Services.

Kids and Money

Worksheet 2 – Child Worksheet

1. How are financial decisions made in your home:
2. What do you see adults doing with money? What did you hear them saying?
3. Does money ever create conflicts in your family?
4. What is the first thing that comes to mind when you think about money?



4300 Baker Road Minnetonka, MN 55343

P:763-231-9510

F:763-231-9520

Securities offered through Raymond James Financial Services, Inc. Member FINRA/SIPC. Investment advisory services offered through Raymond James Financial Services Advisors, Inc. Prosperwell Financial is not a registered broker/dealer, nor is it affiliated with Raymond James Financial Services.

Kids and Money

Worksheet 4 – Adult Worksheet

1. What are some intentional choices your family makes when it comes to money? For example, saving for retirement or college before going out to dinner.

2. How does your family participate in the following:

Shares? _____

Saves/Invests? _____

Spends? _____



4300 Baker Road Minnetonka, MN 55343

P:763-231-9510

F:763-231-9520

Securities offered through Raymond James Financial Services, Inc. Member FINRA/SIPC. Investment advisory services offered through Raymond James Financial Services Advisors, Inc. Prosperwell Financial is not a registered broker/dealer, nor is it affiliated with Raymond James Financial Services.

Kids and Money

Worksheet 4 – Child Worksheet

I want to share my money with:

1. _____
2. _____
3. _____

Draw a picture of how you like to share your money or who you like to share it with:



4300 Baker Road Minnetonka, MN 55343

P:763-231-9510

F:763-231-9520

Securities offered through Raymond James Financial Services, Inc. Member FINRA/SIPC. Investment advisory services offered through Raymond James Financial Services Advisors, Inc. Prosperwell Financial is not a registered broker/dealer, nor is it affiliated with Raymond James Financial Services.

Kids and Money

Worksheet 5 – Child Worksheet

I want to save my money for:

1. _____
2. _____
3. _____

Draw a picture of what you are saving your money for:



4300 Baker Road Minnetonka, MN 55343

P:763-231-9510

F:763-231-9520

Securities offered through Raymond James Financial Services, Inc. Member FINRA/SIPC. Investment advisory services offered through Raymond James Financial Services Advisors, Inc. Prosperwell Financial is not a registered broker/dealer, nor is it affiliated with Raymond James Financial Services.

Kids and Money

Worksheet 6 – Child Worksheet

Make a list of all the things you want. Keep this list and add to it as new things come up. Have your parents help you with the last column of “actual cost” so you know how much you need to get it.

What I want	What I think it costs	Actual Cost
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____



4300 Baker Road Minnetonka, MN 55343

P:763-231-9510

F:763-231-9520

Securities offered through Raymond James Financial Services, Inc. Member FINRA/SIPC. Investment advisory services offered through Raymond James Financial Services Advisors, Inc. Prosperwell Financial is not a registered broker/dealer, nor is it affiliated with Raymond James Financial Services.

Kids and Money

Worksheet 7

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Clean Room 5 points							
Clean Bathroom 5 points							
Respect Others 5 points							
Clean Up After Eating 2 points							
Put Shoes, Jackets, Hats Away 2 points							
Great Behavior on Bus 1 point							
Great Behavior at School 1 point							
Save \$ Each Week 1 point							



4300 Baker Road Minnetonka, MN 55343

P:763-231-9510

F:763-231-9520

Securities offered through Raymond James Financial Services, Inc. Member FINRA/SIPC. Investment advisory services offered through Raymond James Financial Services Advisors, Inc. Prosperwell Financial is not a registered broker/dealer, nor is it affiliated with Raymond James Financial Services.