Prenup Planning Worksheet:

A Conversation Starter for Your Marriage

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This worksheet is designed to help you and your partner start the right conversations before marriage; about money, goals, and future planning.

Step 1: The Conversation Starters:

Use these questions to guide an open, judgment-free discussion. Each partner can answer privately first, then share together.

Financial Foundations

- What are my biggest financial goals for the next 5–10 years?
- What debts or financial obligations do I bring into the marriage?
- How do I feel about budgeting, spending, and saving as a couple?
- What financial habits or boundaries are important to me?

Notes: (write your insights here)

Estate & Legacy Planning:

- Do I want to leave assets to family, children, or charities in the future?
- How would I want our assets handled if something happened to one of us?
- How do we feel about shared vs. separate ownership (businesses, real estate, etc.)?
- Have we discussed life insurance, wills, or trusts yet?

Notes:

Legal & Partnership Agreements:

- What would make a prenuptial agreement feel fair and balanced for both of us?
- Are there specific things (like family property or inheritances) that should be protected?
- How do we want to handle finances if one of us stops working or changes careers?
- What values do we want our prenup to reflect?

Notes:

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Step 2: Your Next Steps:

After you've had your conversation:

- Write down your shared values.
- What do you both agree matters most? Identify your "blind spots."
- Are there any areas where you need guidance (financial, estate, legal)?
- Meet with your team of professionals. A good prenup is collaborative, not adversarial.

Our Shared Values:

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Step 3: Build Your Support Team:

- What are our priorities as a couple and as a blended family?
- How can we communicate about money and planning regularly?
- Which professionals can we trust to help guide us?

Shared (or private) notes:

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Your Professional Team:

These professionals can help you design a prenup, a financial and estate plan, that truly reflects your relationship.

Professional	**Area of Expertise**	**Contact Info**
Family Law Attorney	Legal structure, prenup drafting	*Elizabeth Vaz, Esq.* *E.Vaz@VazLaw.com* *516-340-0282*
Financial Advisor	Financial planning, investments, budgeting	*Melissa Murphy Pavone, CFP®, CDFA®* *Melissa@mindfulpartners.com* *516-340-0282*
Estate Planning Attorney	Wills, trusts, legacy planning	*Catie Seward, Esq.* *Catie@SewardsLaw.com* *516-766-1415*

Remember:

A strong marriage starts with honest communication.

Talking about money and planning isn't unromantic. It's responsible love.

When you and your future spouse approach these topics with openness, you are not planning for divorce. You are planning for success.

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NAVIGATING YOUR JOURNEY THROUGH CANDID CONVERSATIONS