

The _____'s Marital Planning Retreat (Draft)

Date _____

Pre-retreat checklist:

- Complete basic info on the Family Business Plan Spreadsheet
- Both complete the Domain of Functioning Satisfaction Wheel
- Assemble reasonably accurate financial information
- (Take frequent breaks during your retreat: walking together, brief recreational activities, meals. Use conversation cheat sheets if necessary, to keep conflict low, and de-escalate. While both of you may want to keep notes of your discussion, one should be assigned the task of keeping notes, especially to track action steps that you want to take.)

Our Family Mission/Vision Statement:

(If you haven't yet developed a family mission statement, consider taking the time to do so in step three below.)

1. Brainstorming
 - a. What do we want to accomplish in this retreat?
 - b. How would we like to feel at the end of our time?
 - c. To have a sense of progress and direction, what will be different?
2. If this is an annual retreat, review the notes from last year's retreat.
3. Review Family Mission/Vision Statement
4. Take a few minutes to review pictures on your digital devices. Go back one year and scroll through together as a way to recall events of the last 12 months.
5. Last Year Check-in
 - a. Looking back over the last year, what has been accomplished?
 - b. What things bring us satisfaction?
 - c. What goals have been attained?
 - d. Losses during the last year?
 - e. What have been gains?
6. Personal Check-ins
 - a. Using Wheel review domains of functioning.
 - b. What areas are strengths?
 - c. What are the significant areas for growth?
 - d. Hold off planning till #6 below.
7. Financial Discussion:
 1. Warming up

- i. What is my greatest fear about money?
- ii. When in my life have I been the most content financially?
- iii. When does money cause me good feelings?
- iv. When does money cause bad feelings?
- v. How are we compatible, or challenged? i.e. is one of us more of a spender? One more thrifty?

2. Snapshot: Where are we?

1. Assets & Debts

- 1. Review a statement of liabilities and assets
- 2. Pay particular attention to unsecured debt and consumer loans.
- 2. College savings (if needed)
- 3. Retirement
- 4. Investments
- 5. Overview of insurances: life, house, cars, etc. Are we covered to the extent that we need to be? (For couples who are beginning to build assets we recommend the consideration of an umbrella policy)
- 6. Giving: how are we doing with being charitable and helping less fortunate?
- 7. Emergency fund. (there are various paradigms for how to prepare for financial emergencies. Have you agreed on one, and have you achieved it?)

3. Budget (grade yourself for each area)

- 1. Having one
- 2. Implementing/Following it
- 3. Being able to discuss it
- 4. Feeling that we each have input into it

4. Plans for catastrophic changes, illness, death. (For heads of household we recommend a document called "In the event of my death" which guides family on things they would need to know – i.e. financial account information; passwords; insurance policy locations; safe combinations; location of firearms; crucial documents such as titles to vehicles, land etc. This document should be updated yearly. Also, see number 8 below and decide about what to discuss here, and what to leave until then)

5. Action steps re: budget

8. Relationship Check-in

- a. Our sense of relationship connection (scale 1-10)
- b. Assess time together as a couple in the last 12 months
 - 1. Using Wheel
 - 1. What steps can be taken to improve 1-3 areas for each person
 - 2. Resources needed?

3. Concrete action steps?
2. How did we do the last year in terms of recreation?
3. How did we do with discretionary time, i.e. evenings and weekends? Did we get enough together time? Alone time? Did we do regular couple dates?
4. Check in on sex life.
 1. Discuss satisfaction. Explore such things as frequency, who initiates, what helps set the stage for sex? what hinders us? Are we being creative? Do we need to ask for some outside help from friends, family or counselors? Anything we are not talking about?
 2. How do I feel about my body, my sexuality? (take turns discussing your sense of your body, where your libido is at, how are we doing in terms of compatibility.)
 3. Ideas for forward movement?
9. Family Check-in
 1. Review household management (communal chores and job division, do parts applicable to whether you have children or not)
 - i. Action steps to improve (chore charts, how to help each other, etc)
 - ii. How do we feel about discipline approach? Steps to improve?
 - iii. How is responsibility for cooking going?
 - iv. Laundry?
 2. Overview of each child
 - i. Sense of strengths and needs?
 - ii. Are we on the "same page"?
 3. Family goals for the next 12 months?
 1. What trips or travel would we like to do? (we recommend planning up to 10 years in advance your travel/trip dream lists)
 2. What activities would we like to do together?
 4. Evaluate your social lives as individuals and as a couple. Are we out of balance? Do we need to take more initiative, or maybe cut back some?
 5. Are there any pet or animal issues we should discuss?
 6. How do we feel about how we managed significant holidays, gift giving, birthdays, anniversaries? Did both feel an appropriate emphasis on ones that are important to them? How did spending for these go?
10. Legal:
 1. Check in on wills/estate planning. (If you haven't done estate planning consider setting that as a goal this year to get basic wills done)
 2. Assess Life Insurance needs
 3. Assess current "worst case" for childcare (if applicable)
 4. Other?
11. Winding up/Check-in
 1. My sense of how things went

2. Did I feel heard?
3. Do we need outside help? In what areas? (mentoring couples, spiritual assistance, counseling, financial planners, support or growth group?)

12. Summarize post-retreat action steps

1. Plan for 4 week, 10 week, and six month check-ins. Set the dates now.
2. Plan for next year's retreat, date and where we would like to do it.

Finish with recreation, something relaxing and fun. Goal is to celebrate that you took the time to do this.