

This Money Formula Academy worksheet helps you to identify the patterns of your parents, role models, or caretakers.

1. Name of Caretaker or Role Model

2. Briefly describe their role in your life.

3. How would you describe their relationship with money?

4. What behaviors did they exhibit? (For example, hid money, spent it as soon as they got it, hoarded it, never made much, etc)

5. What did you learn to believe from this person's relationship to money?

6. Do you see similar behaviors or attitudes between this person and someone close to you today? Or, perhaps you have taken on these traits. What do you notice?

7. Do these behaviors or attitudes help you or harm you? How can you strive to be different?
