

Money Meetings

A Gentle & Practical Guide

by Meredith Sims

Heart Strong Wealth Planning

*Intentional money support for women building
aligned wealth*



Make Peace With Your Money

Money stress doesn't go away by ignoring it—but you don't need to overhaul your entire life either.

A money meeting is a short, regular check-in with your finances. It's not about tracking every penny—it's about pausing, noticing what's working (and what's not), and choosing your next step with clarity and care. Think of it as a date with your money.

This guide is here to help you build a more supportive relationship with your finances, one simple meeting at a time. Gentle, grounded, and judgment-free. Just a chance to slow down, pay attention, and feel a little more confident.

Meet your money with curiosity, not pressure. Whether solo or with a partner/friend group, here's how to get started.

Start With a Grounding Ritual

- Take a few deep breaths.
- Share one thing you're proud of—financial or otherwise.
- Say something kind to yourself. You're here, and that matters.
- Stretch or do a silly dance before you start if money feels heavy to you.



Step 1: Check In With How You Feel

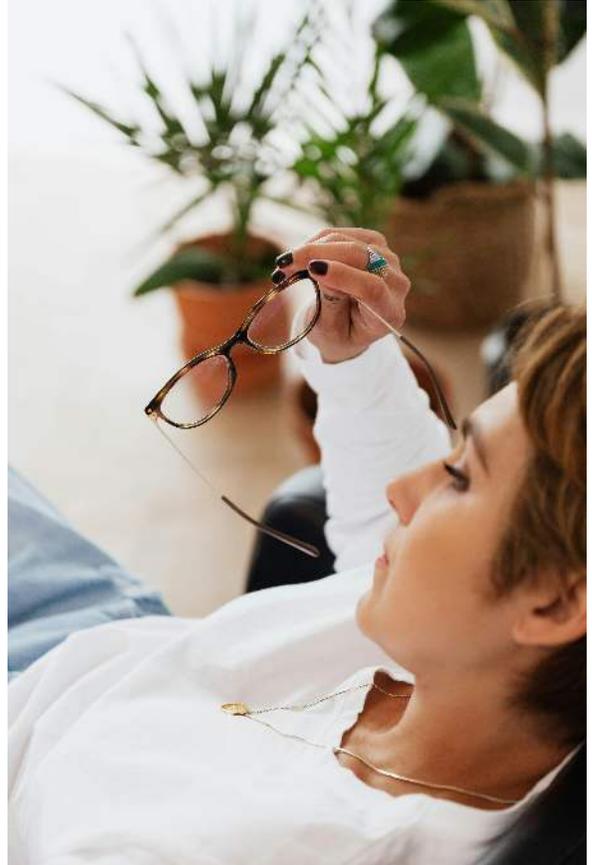
This is about your relationship with money—not just the numbers.

Ask yourself:

- How am I feeling about money today?
- What's one belief I'm working to change?
- What's one thing that's going better than it used to?

You can rate where you're at if that's helpful:

- Money confidence: ___ /10
- Financial stress: ___ /10
- Communication (if partnered): ___ /10



Step 2: Review Income

- Did I send out any invoices?
- Has anything come in—expected or unexpected?
- Are any income sources shifting or slowing down?
- Is there a small way I could bring in more or smooth things out?

Step 3: Check Your Expenses

- What bills are coming up soon?
- Any unusual spending I want to be mindful of?
- Am I spending in ways that still reflect my values?
- What's one change I'd like to test next month?

Step 4: Net Worth

Net Worth is simply what you own minus what you owe. The big picture.

- Did I make any progress—pay down debt, grow savings?
- Is my overall picture trending in a direction I feel good about?
- Even if things didn't change much—what did I learn?

Step 5: Revisit Your Goals

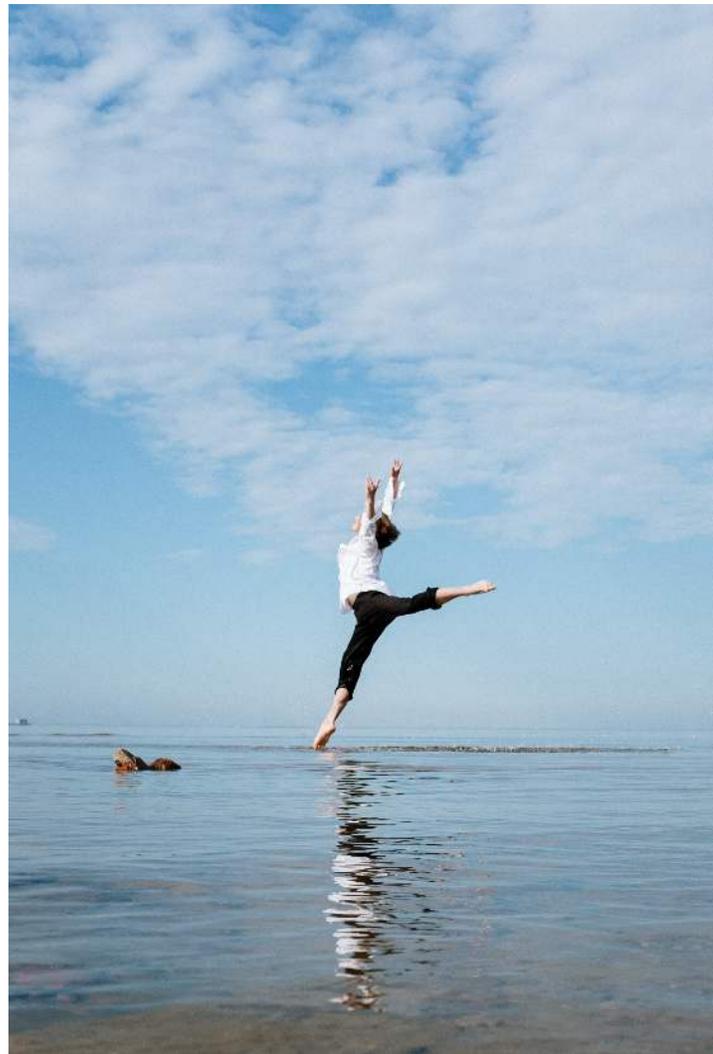
- What did I move forward, even a little?
- What's feeling stuck—and what's one small thing I could try?
- Do I want to update or shift any goals?

Finish Gently

- One win I want to celebrate:
- One intention I'm setting:
- One thing I'm grateful for today:

Reminder: You're building a relationship with your money. Like any relationship, it takes time, curiosity, and care. That matters more than getting it all right.

Enjoy the journey and have some fun along the way!



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Your Money Meeting Worksheet

Use this printable page to guide your check-in.

One small step at a time.

Sections:

1. Start with Mindset

- 3 deep breaths
- Something I'm proud of: _____
- One thing I'm grateful for: _____

2. Check In Emotionally

- My current money confidence: ___ /10
- Financial stress level: ___ /10
- One belief I'm shifting: _____
- Something that feels easier lately:

3. Income Review

- Invoices sent: Y/N
- Income received: \$_____
- Unexpected income: _____
- Notes/thoughts: _____

4. Expenses & Spending

- Upcoming bills: _____
- Any overspending trends: _____
- One small change to try next: _____

5. Net Worth Snapshot

- Savings increased? Y/N
- Debt reduced? Y/N
- General trend: ↑ / ↓ / Neutral
- What I'm noticing: _____

6. Goals Check-In

- Progress made: _____
- What's stuck: _____
- One small next step: _____

7. Close the Meeting

- One thing I did well: _____
- My intention for next time: _____
- Gratitude: _____

About Meredith Sims

I help women build a more peaceful, empowered relationship with money—one rooted in intention, not anxiety. My clients are often spiritually minded, intuitive, and thoughtful about how they move through the world. Many run their own business or are building something on the side. They care about growing wealth—but in a way that feels aligned, grounded, and true to who they are.

Money can be emotional. It can be messy. And it can become a supportive tool once you have the space and rhythm to work with it, not against it.

Want to stay in touch or learn more about working together?

Visit: <https://www.heartstrongwealthplanning.com/next-steps/>

