

# Budget Bestie Agreement

Make money moves together—stronger, smarter, and supported.

Step 1: Meet Your Budget Bestie.

My name: \_\_\_\_\_ My Budget Bestie: \_\_\_\_\_

Step 2: Share Your Top 3 Money Goals.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Step 3: Create Your Check-In Plan.

How often will we check in? (Circle one): Daily | Weekly | Biweekly | Monthly

Preferred Method:

- ☐ Text
- ☐ Call
- ☐ Zoom
- ☐ In-Person
- ☐ Other: \_\_\_\_\_

Step 4: Set Our Accountability Rules (Ex. “We’ll keep things private and supportive”).

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_

Step 5: Choose a Fun (Budget-Friendly) Reward.

When we both hit a goal, we’ll celebrate by: \_\_\_\_\_

Step 6: Sign the Pact.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Budget Bestie Signature: \_\_\_\_\_ Date: \_\_\_\_\_