



# Identify YOUR CORE VALUES

Your values influence your financial decisions. Before you dive into strategizing, it's important to evaluate what matters most to you – so you can stay on track while staying true to your values.

## Step 1: Reflect

Look at the list of values below and choose six that resonate with you the most. If these options don't appeal to you, feel free to write down your own.



ADVENTURE



COMMUNITY



COMPASSION



CREATIVITY



EQUALITY



HEALTH



KNOWLEDGE



NATURE



PLAY



RELATIONSHIPS



SECURITY



SPIRITUALITY



SUCCESS



WEALTH

OTHER

OTHER

## Step 2: Compare

Fill in the chart with the six values you selected. Using the ranking system, compare values to each other to figure out which ones are ultimately more important.

VALUES		RANK				
A		A or B <input type="checkbox"/> <input type="checkbox"/>	A or C <input type="checkbox"/> <input type="checkbox"/>	A or D <input type="checkbox"/> <input type="checkbox"/>	A or E <input type="checkbox"/> <input type="checkbox"/>	A or F <input type="checkbox"/> <input type="checkbox"/>
B		B or C <input type="checkbox"/> <input type="checkbox"/>	B or D <input type="checkbox"/> <input type="checkbox"/>	B or E <input type="checkbox"/> <input type="checkbox"/>	B or F <input type="checkbox"/> <input type="checkbox"/>	
C		C or D <input type="checkbox"/> <input type="checkbox"/>	C or E <input type="checkbox"/> <input type="checkbox"/>	C or F <input type="checkbox"/> <input type="checkbox"/>		
D		D or E <input type="checkbox"/> <input type="checkbox"/>	D or F <input type="checkbox"/> <input type="checkbox"/>			
E		E or F <input type="checkbox"/> <input type="checkbox"/>				
F						

## Step 3: Identify

Tally up how many times you chose each value during step two. The top three values represent your core values.

\_\_\_\_\_

A                      B                      C                      D                      E                      F

### My Core Values

- 1 \_\_\_\_\_
- 2 \_\_\_\_\_
- 3 \_\_\_\_\_

