**Part I: Foundations**

**Key Takeaways**

* Discover the influence your personal values have on your financial decisions
* Learn how to create SMART¹ goals
* Assess where your finances stand today with our questionnaire

**Activity: Exploring Core Values**

When it comes to your financial decisions, staying true to what matters most can really help you stay on track. Before we get into any financial strategies or know-how, let’s identify your core values.

**Step One: Reflect**

Take a look at the list of values below. Select six that resonate with you most. If none of these options suit you, feel free to create your own in the spaces provided.

|  |  |  |  |
| --- | --- | --- | --- |
| **A close up of a logo  Description automatically generated** | **A picture containing plate  Description automatically generated** | **A picture containing light  Description automatically generated** | **A close up of a logo  Description automatically generated** |
| **[ ]  ADVENTURE** | **[ ]  COMMUNITY** | **[ ]  COMPASSION** | **[ ]  CREATIVITY** |
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| **[ ]  EQUALITY** | **[ ]  HEALTH** | **[ ]  KNOWLEDGE** | **[ ]  NATURE** |
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| **[ ]  PLAY** | **[ ]  RELATIONSHIPS** | **[ ]  SECURITY** | **[ ]  SPIRITUALITY** |
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| **[ ]  SUCCESS** | **[ ]  WEALTH** | **OTHER** | **OTHER** |

**Step Two: Compare**

Fill in the chart below with the six values you selected in step one. Using the ranking system, compare your selected values to each other by choosing the one that’s more important to you.

|  |  |
| --- | --- |
| **VALUES** | **RANK** |
| **A** |       | **A** or **B****[ ]** **[ ]**  | **A** or **C****[ ]** **[ ]**  | **A** or **D****[ ]** **[ ]**  | **A** or **E****[ ]** **[ ]**  | **A** or **F****[ ]** **[ ]**  |
| **B** |       | **B** or **C****[ ]** **[ ]**  | **B** or **D****[ ]** **[ ]**  | **B** or **E****[ ]** **[ ]**  | **B** or **F****[ ]  [ ]**  |  |
| **C** |       | **C** or **D****[ ]** **[ ]**  | **C** or **E****[ ]** **[ ]**  | **C** or **F****[ ]** **[ ]**  |  |  |
| **D** |       | **D** or **E****[ ]** **[ ]**  | **D** or **F****[ ]** **[ ]**  |  |  |  |
| **E** |       | **E** or **F****[ ]** **[ ]**  |  |  |  |  |
| **F** |       |  |  |  |  |  |

**Step Three: Identify**

Use these spaces to tally how many times you chose each letter during step two. The values with the highest tallies represent your core values.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|       |       |       |       |       |       |
| **A** | **B** | **C** | **D** | **E** | **F** |

**My Core Values**

|  |  |
| --- | --- |
| **1** |       |
| **2** |       |
| **3** |       |