



Name: _____

Values Exercise

Values are beliefs that can be helpful in making decisions. This exercise will help you to identify the values by which you would ideally live your life. It is important to that you think about the “ideal you” and the “real you.” With some people, the ideal you and real are closely matched. With others they are out of alignment. Note to our values often change over time, so doing this exercise every so often can be helpful. (Especially after life changing events occur.)

The benefit of aligning your values/beliefs with your goals and then consciously linking your thoughts, feelings and behaviors to what is important is what is termed living in alignment. You can also use your values and goals as filters in making decisions when faced with competing emotions. One of my roles as your advisor is helping you manage your behavior when making financial decisions in relation to what is important to you.

Benefits of living in Alignment:

- Reduced stress
- Better decision making
- Increased optimal performance

Directions:

1. Review the values list looking for those that are important to you
2. Check the 15 in column 1 that are ideally important to you.
3. Reduce the top 15 to 10 checking the top 10 in the column 2.
4. Reduce your 10 to 5 and check the Top 5 in column 3.

Note: you can write out another value of your own if you cannot find one that matches. Some people group values e.g. family as being a good spouse, children, friends and community.

1 2 3

			Achievement	Places importance on the fulfillment of activities, goals, tasks or work.
			Adventure	Seeks out and/or participates in exciting events that involve uncertainty.
			Autonomy	Places importance on freedom, independence and individual discretion.
			Challenges	Things situations that test a person's thoughts or abilities.
			Change	A shift from one state, stage, or phase to another.
			Community	A group of people with a common background or characteristic, or with shared interests.
			Competence	Ability to solve problems, demonstrates mastery.
			Competition	Comparison of self, team, or organization against another.

1 2 3

			Cooperation	Placing importance on working together to achieve results; go along with a role.
			Creativity	Placing importance on imagination, inspiration and inventiveness.
			Decisiveness	The ability to make decisions firmly, clearly, conclusively, and in a timely manner.
			Diversity	Appreciates and respects individual differences.
			Environment	Awareness of natural resources.
			Education	Placing importance on learning and teaching.
			Ethics	Valuing moral standards.
			Excellence	Pursuit of the highest level of optimal performance.
			Excitement	Things that engage attention and/or emotion in a lively, stimulating and compelling way.
			Fairness	Placing importance in justice, decency and equality.
			Fame	Recognition by others. Desire to be well known.
			Family	Connection to immediate or extended relations.
			Flexibility	The ability to adapt to different environments, situations or change.
			Freedom	Without obligation.
			Friendship	Strong ties with family, friends, coworkers or members of a certain community.
			Happiness	Feelings of contentment, satisfaction and/or fulfillment.
			Health	Placing importance on physical and emotional well-being.
			Helping Others	Placing importance on assisting other people.
			Honesty	Telling the truth, does not engage in deception. Is forthright and candid.
			Independence	Ability to be self directed in one's thoughts and actions.
			Integrity	Firm adherence to a moral code and/or set of values.
			Leadership	The ability to create relationships in order to complete a stated goal or mission.
			Loyalty	Allegiances to people organizations, ideals, causes, etc.
			Meaningful Work	Doing, and providing work that has a purpose and/or significance.
			Money	Financial assets. The accumulation of wealth.
			Order	Adherence to a system, protocol or code.
			Philanthropy	Giving of monetary gifts in order to benefit others.
			Play	Imagination, spontaneity; the ability to be amused.
			Pleasure	Enjoyment, delight, satisfaction, or fulfillment.
			Power	Strength, superiority, dominance, and/or authority.

1 2 3

			Privacy	The need for solitude or separateness.
			Recognition	Acknowledgment and/or validation.
			Relationships	Connections between and among people.
			Religion	A specific system of belief or worship.
			Safety	A concern for the security and well being of one's self and/or others.
			Security	The feeling of being protected or safeguarded from danger. A sense of comfort.
			Service	Placing importance on serving others with quality and value.
			Spirituality	Appreciating the need to understand one's inner self and its relationship with the world.
			Stability	Taking on day-to-day activities in a calm and consistent manner.
			Status	Placing importance on the position or standing in a relationship, group, community or organization.
			Wealth	Richness in terms of assets or money.
			Work	Employment, occupation, or fulfillment of a task or duty.