

# Your Money, Your Values

What matters to you?

- Security
- Freedom
- Creativity
- Family
- Health
- Adventure
- Generosity
- Learning
- Recognition
- Independence
- Community
- Spirituality
- Success
- Fun
- Balance
- Respect
- Honesty
- Contribution
- Travel
- Comfort

## Section 1: What Matters Most

Write down your top 3 most important values from the list.

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

Why these values? Briefly write one reason.

- Value 1:** \_\_\_\_\_  
\_\_\_\_\_
- Value 2:** \_\_\_\_\_  
\_\_\_\_\_
- Value 3:** \_\_\_\_\_  
\_\_\_\_\_

## Section 2: Your Financial “Why”

List 3 positive things you hope to achieve by managing your money better.

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

List 3 negative financial situations you want to avoid.

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

Section 3: Connecting Values & Money

**Value in action:** For one of your top values in Section 1, describe one way you currently spend money that aligns with it, and one way you could better spend money to reflect it

Value	Current Alignment	Potential Improvement

**Motivation in Action:** Choose one thing you want to achieve from Section 2. How can having a budget help you make progress towards this goal?

Goal	How Budgeting Helps

**Avoiding Negatives with a Budget:** Choose ONE thing you want to avoid from Section 2. How can a budget help you prevent this?

Things to Avoid	How Budgeting Helps