



Explore & Define Your Core Values





Overview

This document guides you through a 3-step process to explore and define your core values.

Why Define Your Core Values?

Impulses, habits, people, and companies are constantly fighting for your attention, time, and money. This is a problem because you have a limited amount of time and money.

Defining your core values is one way to help protect your time and money so you can live your best life. You can also use your core values to uncover opportunities to get more out of your time and money.

STEP 1 – Review and document responses to the following questions

Instructions: Set a recurring 30-minute appointment or task on your calendar to complete this exercise. It may take 2-10 days to complete.

Couples – Complete this exercise independently. Understanding and supporting your partner's core values can be a great way to grow and thrive as a couple.

A. What person has had the most positive influence on your life? What words would you use to describe that person?

B. Briefly describe one of the best days of your life (Ex: Where were you? Who were you with? What made this day special?).



C. What accomplishments are you most proud of in your personal and/or work life?

D. If you were diagnosed with an illness and knew you had 12 months to live, what would you change? How would you spend your time differently than you do now?

E. List any people/causes you feel compelled to take care of financially.

F. What would you do differently if you had an extra hour of free time each day?

G. What would you do differently if you had an extra week of free time each year?



H. In what areas do you excel? What values have helped you excel in these areas?

I. What is most important to you in life?

J. Assume you were given \$1,000/month tax-free for ten years. What would you change? How would you use that money?

K. If a stranger reviewed your above response and had to guess your top 1-3 core values, what would they think your top 1-3 core values might be?

Core Value 1 _____

Core Value 2 _____

Core Value 3 _____



STEP 2 - Add potential core values to the list below.

Consider the following questions/exercises to help get started:

- If you have previously defined your core values, add those to your list.
- Review your responses above and add new potential core values to your list.
- Circle potential values that could help you make the most of your one life.

POTENTIAL CORE VALUES:

- | | |
|-----|-----|
| 1. | 11. |
| 2. | 12. |
| 3. | 13. |
| 4. | 14. |
| 5. | 15. |
| 6. | 16. |
| 7. | 17. |
| 8. | 18. |
| 9. | 19. |
| 10. | 20. |



STEP 3 – DEFINE YOUR CORE VALUES

Using the tips and questions below, narrow down your potential list of Core Values until you have finalized your top 2-3 Core Values.

1st Core Value _____

2nd Core Value _____

3rd Core Value (if applicable) _____

Tips & Questions

Why have only 2-3 core values?

You can't be everything to everybody, including yourself. Imagine you had to make decisions using five core values: health, courage, fun, faith, and family. You could always use the "fun" value to rationalize any decision, which might take away from your other values.

Consider crossing out values that feel like a sub-value of other values.

Take a break

Take a break to clear your head. Go for a walk, meditate, pray, or do anything that could help you gain clarity when faced with a difficult decision.

Are you stuck after three days?

Cross off and eliminate 1-2 values per day until you arrive at your top 2-3 core values.

Begin using your core values to live your best life.

Contact our office if you would like an exercise that uses your core values to brainstorm opportunities to get more out of your time, money, and relationships.

Acceptance	Compassion	Empowerment	Greatness
Accomplishment	Competence	Encouragement	Grit
Accountability	Competition	Endurance	Growth
Achievement	Composure	Energy	Guidance
Adventure	Comprehensive	Engagement	Happiness
Affection	Concentration	Entertainment	Harmony
Altruism	Confidence	Enthusiasm	Health
Ambition	Connection	Entrepreneurship	Heart
Amusement	Contentment	Environment	Helpfulness
Appreciation	Contribution	Equality	Heroism
Approachability	Control	Ethical	Holiness
Assertiveness	Conviction	Excellence	Honesty
Attentiveness	Cooperation	Excitement	Honor
Awareness	Courage	Experience	Hope
Balance	Craftsmanship	Expertise	Hospitality
Beauty	Creativity	Exploration	Humility
Belonging	Credibility	Fairness	Humor
Boldness	Curiosity	Faith	Imagination
Bravery	Decency	Faithfulness	Impact
Brilliance	Decisiveness	Family	Improvement
Calm	Dedication	Fearless	Independence
Candor	Dependability	Fidelity	Innovation
Capable	Determination	Fitness	Insightfulness
Caring	Development	Flexibility	Inspiration
Certainty	Devotion	Focus	Integrity
Challenge	Differentiation	Foresight	Intelligence
Change	Dignity	Freedom	Intensity
Character	Discipline	Friendliness	Intuitiveness
Charity	Discovery	Friendship	Joy
Cheerfulness	Diversity	Fun	Justice
Clarity	Dominance	Futuristic	Kindness
Collaboration	Drive	Generosity	Knowledge
Comfort	Economical	Giving	Laughter
Commitment	Education	Goodness	Leadership
Communication	Effectiveness	Grace	Learning
Community	Empathy	Gratitude	Liberty



Listening	Personal growth	Restraint	Tradition
Logic	Philanthropy	Results	Training
Longevity	Physical fitness	Reverence	Tranquility
Love	Playfulness	Rigor	Transparency
Loyalty	Pleasant	Risk-taking	Trust
Margin	Poise	Sacrifice	Trustworthiness
Mastery	Positivity	Safety	Truth
Merit	Potential	Satisfaction	Understanding
Mindfulness	Power	Security	Unique
Moderation	Prepared	Self-control	Unity
Modesty	Preservation	Sense of humor	Useful
Motivation	Pride	Sensitivity	Valiant
Neighborly	Proactive	Service	Valor
Noble	Productive	Sharing	Value
Non-conforming	Professional	Significance	Variety
Nurture	Prosperity	Simplicity	Virtuous
Obediency	Prudence	Solitude	Vision
Objectivity	Purity	Speed	Vitality
Openness	Purpose	Spirit	Warmth
Opportunity	Quality	Spirituality	Watchful
Optimism	Rational	Spontaneity	Wealth
Organization	Real	Stability	Welcoming
Originality	Realistic	Standardization	Willfulness
Outstanding	Reasonable	Status	Winning
Partnership	Recreation	Stewardship	Wisdom
Passion	Reflection	Strength	Wonder
Passionate	Relationships	Success	Work-life balance
Patience	Relaxation	Support	Youthful
Patriotic	Reliability	Sustainability	
Peace	Resilience	Sympathy	
People-centered	Resolve	Synergy	
Perceptiveness	Resourcefulness	Talent	
Perfection	Respect	Thankfulness	
Performance	Responsibility	Thoughtfulness	
Perseverance	Responsiveness	Timeliness	
Persistence	Rest	Tolerance	