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Your Goals and Values

Knowing your goals and values is important. We often have an ideal self-image. Our values and goals drive an ideal self-image. Knowing your values and goals will enable us to craft a financial plan aligned to your ideal-self.

Your Values

Below is a list of 25 values, beliefs, or personal characteristics for your consideration. The following steps should help you identify which are most important to you. Sometimes, you might find it helpful to consider two values at a time, asking yourself about the relative importance of one over the other. To do this, first choose 10 values. Then from the remaining ten choose five values.

Self-Respect	Stability	Generosity	Rationality	Autonomy
Non-Conformity	Health	Fame	Family	Independence
Purpose	Growth	Self-Control	Achievement	Change
Order	Leisure	Tradition	Wealth	Comfort
Responsibility	Risk	Industry	Safety	Simplicity

Let’s choose the important values here. Choose ten values from the above 25. Write them here:

Let’s choose the most important values here. Choose five values from the ten you selected from the original 25. Write them here:

Goals Wish List

The Goals Wish List is your opportunity to be optimistic about what you want to achieve. It’s a chance for you to get all your goals down in writing, even if you might not be able to achieve them right now. This exercise allows you to begin organizing your thoughts and setting yourself up for success. This is also an important exercise for partners. As it will help both of you to become aligned and on the same page.

Try to be as specific as possible with your goals. Your goals should be SMART: Specific, Measurable, Achievable, Relevant, and Time-bound.

Example Goal:

- What: Build Home
- When: 2025
- How much: $200,000
- Details: Want to place 20% down payment on home and want use equity in existing home to offset loan so that we are not increasing our monthly mortgage payment.

Goal 1

- What:
- When:
- How much:
- Details:
- Values that support this goal:

Goal 2

- What:
- When:
- How much:
- Details:
- Values that support this goal:

Goal 3

- What:
- When:
- How much:
- Details:
- Values that support this goal:

Goal 4

- What:
- When:
- How much:
- Details:
- Values that support this goal:

Goal 5

- What:
- When:
- How much:
- Details:
- Values that support this goal:

Goal 6

- What:
- When:
- How much:
- Details:
- Values that support this goal:

Goal 7

- What:
- When:
- How much:
- Details:
- Values that support this goal:

Goal 8

- What:
- When:
- How much:
- Details:
- Values that support this goal: