Fall Into Financial Planning

Core Values Worksheet

Clarify What Matters Most

Your financial plan should reflect your values, not just the numbers. This worksheet is designed to help you identify what matters most so your goals and decisions stay aligned with your priorities.

How do I define success, security, and a life well-lived?

What does a perfect day, month, or year look like to me? How am I spending my time?

If money were not a consideration (i.e., I have enough money to take care of my needs now and in the future), how would I live my life? What would I do with the money? Would I change anything about my current life?

What about money is important to me?

What brings me happiness and fulfillment? What would I regret not doing over the next 10-20 years?

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Values Checklist

Check the values that feel most meaningful to you in this stage of life. Use your reflections from the previous page as a guide.

- [ ] Achievement
- [ ] Adaptability
- [ ] Adventure
- [ ] Autonomy
- [ ] Balance
- [ ] Boldness
- [ ] Challenge
- [ ] Community
- [ ] Competence
- [ ] Connection
- [ ] Contentment
- [ ] Contribution
- [ ] Courage
- [ ] Creativity
- [ ] Curiosity
- [ ] Discipline
- [ ] Education
- [ ] Engagement
- [ ] Excellence
- [ ] Family
- [ ] Flexibility
- [ ] Freedom
- [ ] Friendship
- [ ] Fun
- [ ] Generosity
- [ ] Gratitude
- [ ] Health
- [ ] Helping Others
- [ ] Home
- [ ] Honesty
- [ ] Humor
- [ ] Independence
- [ ] Integrity
- [ ] Joy
- [ ] Kindness
- [ ] Learning
- [ ] Legacy
- [ ] Loyalty
- [ ] Meaningful Work
- [ ] Nature
- [ ] Open-mindedness
- [ ] Optimism
- [ ] Optionality
- [ ] Personal Growth
- [ ] Purpose
- [ ] Relationships
- [ ] Resilience
- [ ] Responsibilty
- [ ] Safety
- [ ] Security
- [ ] Service
- [ ] Spirituality/faith
- [ ] Stability
- [ ] Success
- [ ] Travel
- [ ] Wisdom
- [ ] ______________
- [ ] ______________
- [ ] ______________
- [ ] ______________

Bring Your Values to Life

Use this worksheet as a starting point for deeper conversations about your goals. When you're ready, an MBI financial planner can help you put your values into action.

Start the Conversation with MBI

Stephanie Anderson, CFA, CFP®, CDFA®
Manager - Financial Planning
sanderson@cbmcpa.com