

RPS

VALUES

## Values Builder - Your Retirement Compass

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Personal values are words or phrases that describe your non-negotiable priorities, culture and the core forces that drive how you operate on a daily basis in your life. They should reflect who you are and may also reflect who you aspire to be.

In this exercise, you will list at least ten values that resonate for you, and then narrow your final list down to seven or less.

**Step 1:** Without looking up examples – your mind free of suggestion – list the first 10 words that come to mind that represent what is most important to you in life. You will have the opportunity to think more about this and look at examples later. For now, go with what your gut tells you.

1.		6.	
2.		7.	
3.		8.	
4.		9.	
5.		10.	

**Step 2:** Now, from the list below, circle or highlight values that also highly resonate with you.

Abundance	Conscientiousness	Fitness	Knowledge	Reason
Accountability	Conservation	Freedom	Leadership	Recognition
Accuracy	Contentment	Friendship	Learning	Relationship
Achievement	Continuous Improvement	Frugality	Love	Reliability
Activism	Control	Future focus	Loyalty	Resilience
Adventure	Courage	Generosity	Mastery	Respect
Affluence	Creativity	Grace	Nature	Safety
Altruism	Decisiveness	Growth	Open-mindedness	Security
Ambition	Dignity	Happiness	Openness	Service
Audacity	Diligence	Hard Work	Ownership	Simplicity
Authenticity	Discipline	Harmony	Passion	Social Activism
Balance	Diversity	Health	Peace	Spirituality
Beauty	Duty	Honesty	Perseverance	Stability
Client-focus	Empowerment	Humility	Positivity	Stewardship
Collaboration	Enjoyment/Fun	Independence	Power	Success
Comfort	Enthusiasm	Individuality	Pride	Teamwork
Commitment	Equality	Innovation	Productivity	Tolerance
Community	Excellence	Integrity	Professionalism	Tradition
Compassion	Excitement	Intelligence	Progress	Trust
Confidence	Fairness	Joy	Prosperity	Truth
Confidentiality	Faith	Justice	Purpose	Wellness
Connection	Family	Kindness	Quality	Wisdom

Step 3: Use your initial 10 words from Step 1 and the selected words in Step 2 and narrow your list to your top 5-7 values.

1.	
2.	
3.	
4.	
5.	
6.	
7.	

Step 4: (For Couples): Have your partner complete this worksheet and together, narrow the list down to the top 5-7 "Family Values."

1.	
2.	
3.	
4.	
5.	
6.	
7.	

Congratulations, you have completed a critical step for living your best work-optional life. Your decisions around money become much simpler when you are clear on your values.

You can find out more on values & planning by listening to our podcast episodes No. 16, 24, 27.

*"It's not hard to make decisions when you know what your values are."* - Roy Disney

*"Open your arms to change but don't let go of your values."* – Dalai Lama

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