**Aligning With Values Worksheet**

**Step 1 - Identify Your Values**

Mark how important each of the values in the table are to you. Include any values that are not in the list under “Other”. Give them a rating out of 5 (5 indicating that this value is extremely important to you)

|  |  |
| --- | --- |
|  | Rating |
| Being physically healthy |  |
| Being emotionally healthy |  |
| Being in a satisfying and healthy romantic relationship |  |
| Having close friendships |  |
| Having and raising happy and healthy children |  |
| Completing my education or saving for my children’s education |  |
| Having a fulfilling job or doing work that I enjoy |  |
| Having a sense of belonging or being part of a group |  |
| Helping others |  |
| Being adventurous or travelling |  |
| Being financially secure |  |
| Being able to support myself financially |  |
| Being able to support my family financially |  |
| Having money for leisure and hobbies |  |
| Following the traditions of my culture |  |
| Living by religious beliefs |  |
| Having status and prestige |  |
| Growing as a person or learning new things |  |
| Being able to manage my debt |  |
| Other |  |
| Other |  |
| Other |  |

**Step 2: Prioritize and examine your values**

Examine your top three values and reflect on why they are important to you and how they affect the way you spend money.

|  |  |
| --- | --- |
| Value 1 |  |
| This is important to me because: |  |
| This affects the way I spend money by: |  |

|  |  |
| --- | --- |
| Value 2 |  |
| This is important to me because: |  |
| his affects the way I spend money by: |  |

|  |  |
| --- | --- |
| Value 3 |  |
| This is important to me because: T |  |
| his affects the way I spend money by: |  |

**Step 3: Analyse your spending using your values**

You can continue to self-reflect on your values as you create or modify a budget.

As you track your spending, look at each item that you spend money on and ask yourself the following questions:

1. Does this align with my values? (Yes or no)
2. What value does it align with?
3. Is there a substitute to meet the same value that costs less?