



*When your money is aligned with your values, financial decisions become easier and guilt disappears.*

## PART 1 - IDENTIFY YOUR CORE VALUES

Circle or check your top 5 personal values:

<input type="checkbox"/> Family	<input type="checkbox"/> Security	<input type="checkbox"/> Freedom	<input type="checkbox"/> Legacy	<input type="checkbox"/> Faith
<input type="checkbox"/> Adventure	<input type="checkbox"/> Health	<input type="checkbox"/> Education	<input type="checkbox"/> Community	<input type="checkbox"/> Independence
<input type="checkbox"/> Generosity	<input type="checkbox"/> Comfort	<input type="checkbox"/> Achievement	<input type="checkbox"/> Creativity	<input type="checkbox"/> Service
<input type="checkbox"/> Loyalty	<input type="checkbox"/> Integrity	<input type="checkbox"/> Joy	<input type="checkbox"/> Leadership	<input type="checkbox"/> Peace

Any values not listed? Add them here: \_\_\_\_\_

## PART 2 - WHERE IS YOUR MONEY GOING RIGHT NOW?

List your top 5 spending categories last month (be honest no judgment):

#	Spending Category	Monthly Amount	Aligns with My Values?
1	_____	\$ _____	<input type="checkbox"/> Yes <input type="checkbox"/> No
2	_____	\$ _____	<input type="checkbox"/> Yes <input type="checkbox"/> No
3	_____	\$ _____	<input type="checkbox"/> Yes <input type="checkbox"/> No
4	_____	\$ _____	<input type="checkbox"/> Yes <input type="checkbox"/> No
5	_____	\$ _____	<input type="checkbox"/> Yes <input type="checkbox"/> No

## PART 3 - FIND THE GAP

Looking at your values and your spending where is the biggest gap?

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Is there something you spend money on that does NOT align with any of your values?

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Is there a value very important to you but gets ZERO financial investment right now?

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_



## PART 4 - REALIGN YOUR MONEY WITH YOUR VALUES

Complete these statements:

I will **STOP** spending money on: \_\_\_\_\_

I will **REDUCE** spending on: \_\_\_\_\_

I will **START** investing in: \_\_\_\_\_

I will **PROTECT** money for: \_\_\_\_\_

My #1 financial priority going forward is: \_\_\_\_\_

### My Values-Based Money Commitment

I commit to making financial decisions that reflect what I truly value. I will stop letting money flow to things that do not serve my vision. I am building a life and a legacy with intention.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Ready to build a financial plan that honors your values? Book your FREE 30-Minute Clarity Call. Scan the QR code above or visit [www.dickeyfinancialfirm.com](http://www.dickeyfinancialfirm.com). Your wealth journey starts with intention.