

# KNOW YOUR PERSONAL CORE VALUES

mini workbook



## COPYRIGHT

Copyright© 2022 by Money for the Mamas. All rights reserved.

This workbook or any portion thereof may not be reproduced or used in any manner whatsoever without the express written permission of the publisher

[www.moneyforthemamas.com/legal-stuffs](http://www.moneyforthemamas.com/legal-stuffs)

# HI THERE!

---



I'm Kari  
money nerd + mama

*Kari*

If you're new to Money for the Mamas, let me introduce myself! I am a wife to a hilarious guy that makes killer pancakes. A Mama to a sassy 5yr old girl, and I also happen to be a huge money nerd and goal setter!

I love helping Mamas (just like you!) realize that managing your money doesn't have to be scary or intimidating! It can be fun (yeah, see, I'm a total nerd!).

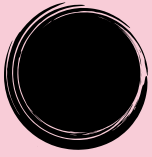
I want you to feel **CONFIDENT** about managing your money!

I want you to feel **EXCITED** about achieving your big money goals!

I want you to feel the **FREEDOM** that comes with not being overwhelmed with money worries!

I want you to feel that you are doing the **BEST DAMN** mom job ever, because you are creating the best future for your family!

Much love to you Mama!



# THE STEPS

## Step 1:

Understand that knowing your own personal core values can help you align your actions with what you hold most important. Doing this will lead to greater happiness with yourself, your lifestyle, and your future.

## Step 2:

Read through all of the core value keywords and then go back through and highlight the ones that really resonate with you. Only choose ones that you feel strongly about (this is key!). Narrow down your keywords until you are left with just five.

## Step 3:

Identify why those five keywords are important to you. Do your current habits bring you closer to these values? If not then ask yourself... Will it bring me lasting happiness?" What do I need to start/stop/change to bring me closer in line with the values I identified as being important? What goals do I need to make to help me live a life true to these values?



## EXAMPLE - MY CORE VALUES

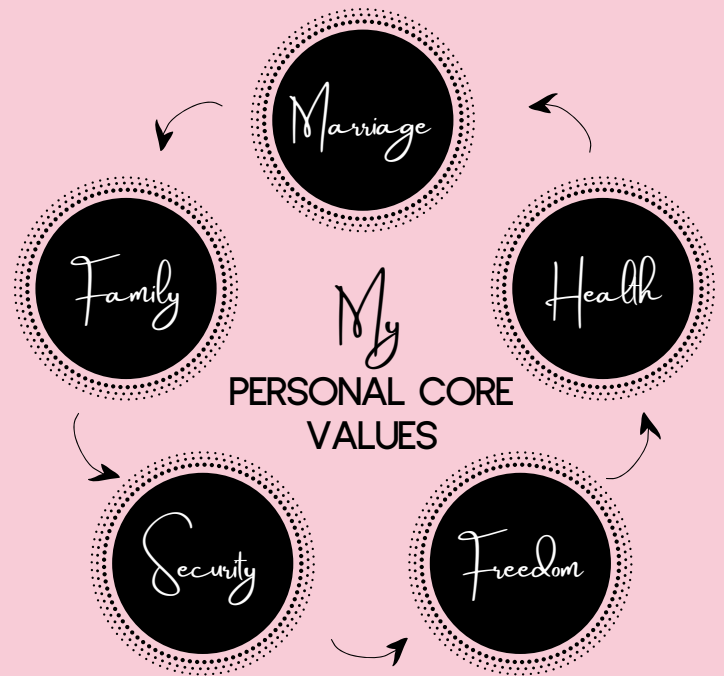
I went through the exercise, and here are the values that I picked as being the most important to me.

Do - Your Core Values

Think - Why are they important to me?

Know - If these are the things important to me, my actions should support them.

Plan - What is your "goal", what action items do you have to reach your goal?



## EXAMPLE - MY SECURITY VALUE

Goal - To provide a secure financial future for my family.

Action Steps -

1. Get a Living Trust set up within two months
  - research three online places
  - compare on user reviews, attributes and price. Make choice and call!
  - fill out paperwork, get notarized and move assets into the Trust's name.

2. Set aside money for retirement
  - decide how much money we should set aside into tax advantaged accounts
  - workplace 401k: match amount, see HR for paperwork
  - IRA: automate monthly deductions from bank account



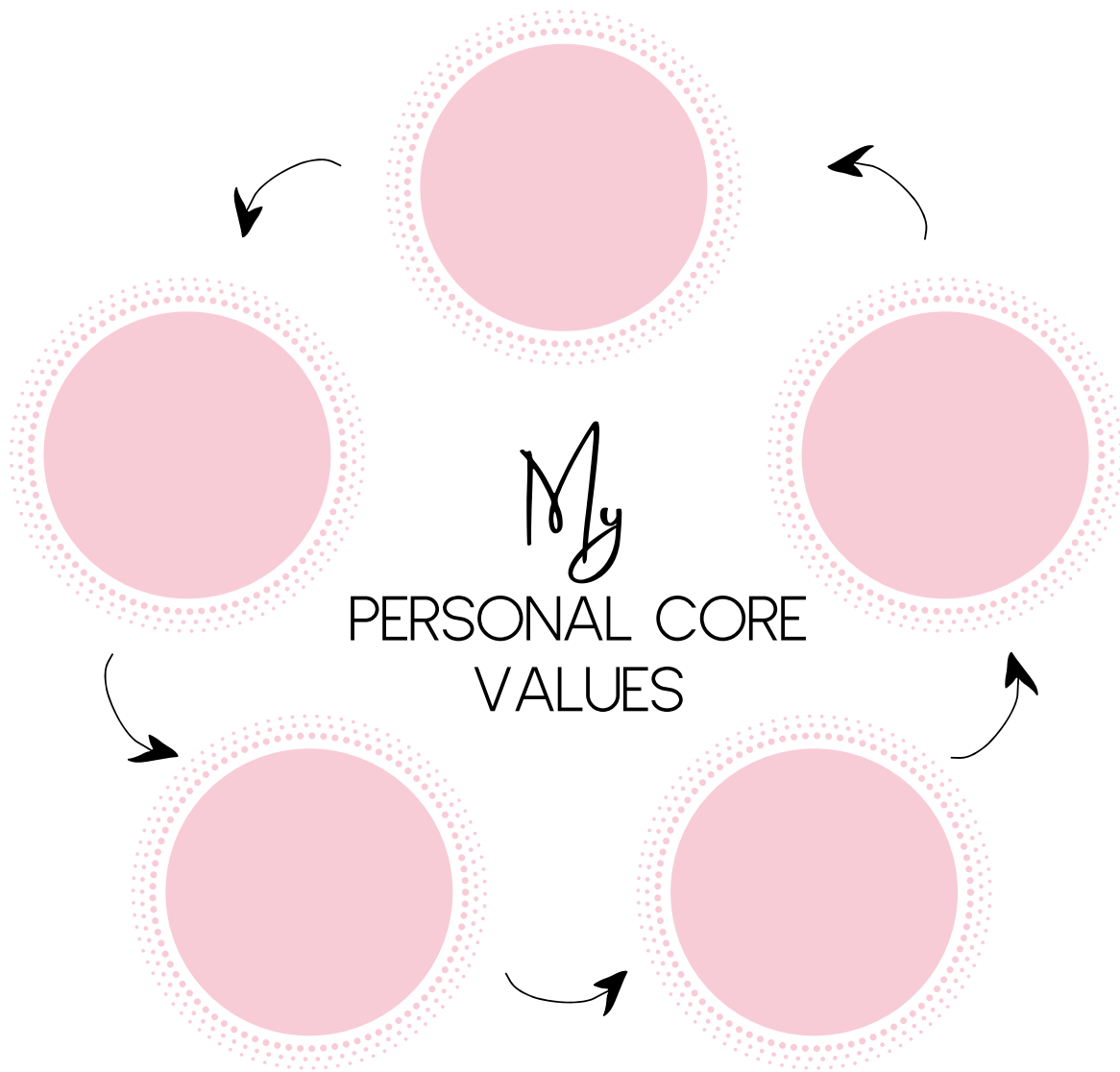
# CHOOSE YOUR CORE VALUES:

Highlight values that resonate with you, be selective! some may sound similar, yet have distinct differences. Get messy on this page, highlight, cross out, and circle until you have your top five!

Acceptance	Openness	Empathy	Awareness
Balance	Thankful	Drive	Inspiring
Commitment	Creativity	Wealth	Contentment
Individuality	Health	Vitality	Marriage
Kindness	Family	Peace	Grace
Security	Achievement	Intelligence	Energy
Connection	Happiness	Joy	Dependability
Freedom	Integrity	Compassion	Gratitude
Ethical	Stability	Strength	Friendship
Dignity	Courage	Service	Fun
Loyalty	Community	Calm	Self-reliance
Passion	Purpose	Bravery	Clear
Tranquility	Accomplishment	Fairness	Confidence
Honesty	Hope	Serenity	Trust
Spirituality	Reflective	Determination	Independence

# CHOOSE YOUR CORE VALUES (CONT):

Imagination	Excellence	Wonder	Selfless
Significance	Generosity	Enjoyment	Boldness
Ambition	Careful	Structure	Growth
Insightful	Sensitivity	Transparency	Present
Altruism	Hard Work	Unity	Fearless
Curiosity	Improvement	Potential	Optimism
Devotion	Responsibility	Conviction	Honor
Persistence	Prosperity	Welcoming	Endurance
Teamwork	Sincerity	Discovery	Uniqueness
Dedication	Capable	Contribution	Love
Originality	Sustainability	Inquisitive	Giving
Meaning	Development	Toughness	Fortitude
Intuitive	Patience	Beauty	Certainty
Wisdom	Success	Enthusiasm	Adaptability
Comfort	Understanding	Trustworthiness	Spirit
Playfulness	Equality	Reverence	Harmony
Vision	Thoughtful	Quality	Respect



THESE VALUES ARE  
IMPORTANT TO ME BECAUSE...



Notes: To help you live in line with your values, what are your goals, action items, and habits to foster?

# WANT THE FULL GOAL PLANNER?

28 page guided workbook

[click here!](#)

**SPECIAL DISCOUNT**  
For Wendy's Way to Health Advent Calendar - use code "ADVENT" for 50% off the full goal planner

- step by step guide on what to do
- expanded SMART goal setting for your 5 big biggest goals
- how to prioritize your goals
- 30/60/90 review exercise
- goal gut check exercise
- what to do when you're struggling

