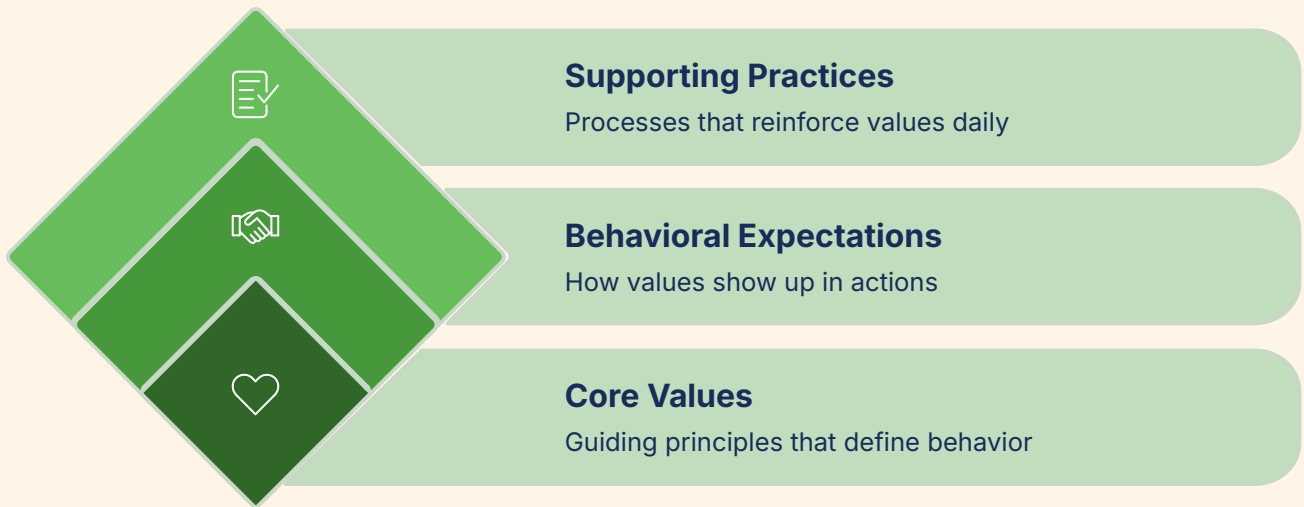


Client Worksheet To Prioritize Values

Use this worksheet to evaluate how well your current life and financial decisions align with your core values. Take your time with each value and be honest in your assessment—this reflection is the foundation for creating meaningful change.



MPM Wealth Advisors

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Core Values

Begin by identifying one of your core values. This could be family, health, creativity, security, adventure, community, learning, or any other principle that matters deeply to you.

 **Instructions:** Use your **Client Values Checklist** to identify your top core values. Write those top 5-7 core values below.

On a scale of 1 to 10, how important is this value to you?

Rate the importance of this value on a scale where:

- **1-3** = Not very important to me
- **4-6** = Somewhat important, but not a top priority
- **7-9** = Very important to me
- **10** = Absolutely essential—one of my core priorities

 **Instructions:** Circle or write down your number. Trust your gut reaction—your first instinct is usually the most honest assessment.

My Core Values

📝 List the core values that matter most to you. For each, rate the importance of this value on a scale of 1-10 and provide a brief description of what that value means to you or how it shows up in your life.

Core Value	Rating	What does this value mean to you?

My Top Three Values

This worksheet is where your values begin translating into financial strategy.

Now that you've assessed your core values, it's time to identify and reflect on your highest-rated ones.

-  **Instructions:** Review your ratings from the previous page and identify your top three values—those that scored highest or resonate most deeply with you.

Reflect on your Top Values

For each of your top three values, consider the following prompts and questions:

Value 1: _____

How is this value currently expressed in your life? Where does your current financial behavior support or contradict this value?

- What does living this value look like for you?
- How do your daily choices reflect this?
- What would it look like if this value were even more central to your life?

Value 2: _____

How is this value currently expressed in your life? Where does your current financial behavior support or contradict this value?

- What does living this value look like for you?
- How do your daily choices reflect this?
- What would it look like if this value were even more central to your life?

Value 3: _____

How is this value currently expressed in your life? Where does your current financial behavior support or contradict this value?

- What does living this value look like for you?
- How do your daily choices reflect this?
- What would it look like if this value were even more central to your life?
