

Financial Values Inventory

Your values are beliefs or ideas that you consider important or desirable. Everyone has values, but everyone does not value the same things equally.

To help you recognize some of your own money values, read the pairs of words below, then circle one item in **the pair** that would be your first choice in answering the question, "If you had an extra \$100, which of the two items would you spend it on?" You must make one choice in each pair.

- | | |
|---|---|
| <input type="checkbox"/> Housing (Dream Home/Vacation Home)
<input type="checkbox"/> Retirement Savings/Investments

<input type="checkbox"/> Retirement Savings/Investments
<input type="checkbox"/> Hobbies/Sports

<input type="checkbox"/> Social Activities/Eating Out
<input type="checkbox"/> Car

<input type="checkbox"/> Social Activities/Eating Out
<input type="checkbox"/> Personal Appearance/Grooming/Clothes

<input type="checkbox"/> Education: Self/Others
<input type="checkbox"/> Housing (Dream Home/Vacation Home)

<input type="checkbox"/> Vacation/Travel
<input type="checkbox"/> Church/Charitable Giving

<input type="checkbox"/> Car
<input type="checkbox"/> Personal Appearance/Grooming/Clothes

<input type="checkbox"/> Retirement Savings/Investments
<input type="checkbox"/> Hobbies/Sports

<input type="checkbox"/> Hobbies/Sports
<input type="checkbox"/> Car

<input type="checkbox"/> Housing (Dream Home/Vacation Home)
<input type="checkbox"/> Vacation/Travel | <input type="checkbox"/> Hobbies/Sports
<input type="checkbox"/> Church/Charitable Giving

<input type="checkbox"/> Church/Charitable Giving
<input type="checkbox"/> Social Activities/Eating Out

<input type="checkbox"/> Housing (Dream Home/Vacation Home)
<input type="checkbox"/> Retirement Savings/Investments

<input type="checkbox"/> Personal Appearance/Grooming/Clothes
<input type="checkbox"/> Vacation/Travel

<input type="checkbox"/> Hobbies/Sports
<input type="checkbox"/> Housing (Dream Home/Vacation Home)

<input type="checkbox"/> Personal Appearance/Grooming/Dress
<input type="checkbox"/> Education: Self/Others

<input type="checkbox"/> Education: Self/Others
<input type="checkbox"/> Car

<input type="checkbox"/> Retirement Savings/Investments
<input type="checkbox"/> Social Activities/Eating Out

<input type="checkbox"/> Personal Appearance/Grooming/Dress
<input type="checkbox"/> Vacation/Travel

<input type="checkbox"/> Church/Charitable Giving
<input type="checkbox"/> Social Activities/Eating Out |
|---|---|

Now total up the number of times you circled each item in the pair activity:

Car _____	Charitable Giving _____	Education _____
Hobbies/Sports _____	Housing _____	Personal Care _____
Retirement _____	Social _____	Travel _____



Adapted from the High School Financial Planning Program (NEFE@), 1992.