

## Clarifying your Values

Before you think about numbers or goals, take a moment to pause. This guide is an invitation to reconnect with what matters most — the values God has woven into your life, the priorities that shape your decisions, and the hopes you carry into the next season. Whether you’re feeling steady, stretched, or somewhere in between, you are not behind. You are simply beginning with clarity.

### Who you are and what matters most

This planning guide is an invitation to clarify the values that shape your decisions, your priorities, and your financial life. At Flourish Financial Life Planning, meaningful planning begins with understanding what truly matters to you—not the values you inherited, or the ones you feel you *should* hold, but the ones that genuinely reflect what is most important in this season of your life.

### How to Use This Guide

Set aside a few quiet minutes. Move through each step at your own pace. There are no right or wrong answers — only what is true for you in this season. Let this be a moment of reflection, not perfection

### Step One

In the table below is a list of values and ideals that resonate with many people. From this list, please **circle** any words that feel meaningful to you. Start broad, knowing there are no right or wrong choices. You can circle as many as you want to. This is not an exhaustive list, so feel free to add any words that more closely align with who you are.

ACHIEVEMENT	DIVERSITY	HUMOR	PRIVACY
ADVENTURE	ENVIRONMENT	INDEPENDENCE	RATIONALITY
AUTHORITY	EDUCATION	INNOVATION	RECOGNITION
AUTONOMY	ETHICS	INTEGRITY	RELATIONSHIPS
BEAUTY	EXCELLENCE	JUSTICE	RELIGION
BOLDNESS	EXCITEMENT	KNOWLEDGE	RESPECT
CHANGE	FAMILY	LEADERSHIP	RESPONSIBILITY
CHALLENGES	FAIRNESS	LEISURE	SAFETY



# Flourish

FINANCIAL LIFE PLANNING

COMMITMENT	FAITH	LOVE	SECURITY
COMMUNITY	FAME	LOYALTY	SELF-CONTROL
COOPERATION	FLEXIBILITY	MEANINGFUL WORK	SERVICE
COMPASSION	FRIENDSHIP	MONEY	SIMPLICITY
COMPETENCE	FREEDOM	NON-CONFORMITY	SPIRITUALITY
COMPETITION	FUN	OPENNESS	STABILITY
CONNECTION	GENEROSITY	ORDER	STATUS
CONTRIBUTION	GROWTH	PASSION	TRADITION
COURAGE	HAPPINESS	PEACE	VIRTUE
CREATION	HARD WORK	PHILANTHROPY	WEALTH
CURIOSITY	HEALTH	PLEASURE	
DECISIVENESS	HELPING OTHERS	PROBLEM SOLVING	
DEPENDABILITY	HONESTY	POWER	

## Step Two

From the values you circled, choose ten that feel especially meaningful and list them below.


## Step Three

From your list of ten, choose the five values or ideals that feel central to who you are. For the purposes of financial planning, these will be considered your core values.

- 1.
- 2.
- 3.
- 4.
- 5.

## Further Reflection

Please consider the following questions to reflect on how your core values guide your life.

- How are these values showing up in my life right now?





- Are there any values I've named that don't feel reflected in my life currently?
- In what ways do my financial choices reflect these values?
- Is there anything from my past — an experience, belief, tradition, or expectation — that makes it hard to fully live out these values in my financial life?

## Bringing It All Together

Consider these final questions as you reflect on what you discovered:

- Which value surprised me or felt newly important?
- Where do I feel most aligned with my values right now?
- Where do I feel tension or misalignment?
- What is one small shift I feel invited to make in the next 30 days?
- What support would help me live more fully into these values?

You've just completed the foundational step of the Flourish Financial Life Planning Process. If you'd like help turning your values into a financial plan that reflects your faith, your purpose, and the season you're stepping into, I'd love to walk with you.

You're already on your way.





## **About Flourish Financial Life Planning**

Flourish Financial Life Planning exists to help women of faith live with peace, purpose, and clarity in every season of life. Money touches every corner of our stories — our families, our hopes, our fears, our decisions — and it deserves a place of calm, not chaos.

At Flourish, financial planning begins with what matters most: your values, your faith, and the life you feel called to build. Numbers come later. First, we listen for the deeper story God is writing.

I walk alongside women who want more than a traditional financial plan. They want alignment. They want confidence. They want a path that honors both wisdom and faith. Through a collaborative, values-first process, we create a plan that supports your goals, strengthens your stewardship, and reflects the purpose God has placed in you.

If this guide has sparked clarity or curiosity, you're already on your way. You don't have to navigate this alone. You were made to flourish.

I am happy to help you with any next steps that are in your heart. You can email or call me, and we can talk about what matters most to you right now. I'd be honored to walk with you.

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