



INSPIRATION
Café

LIFE DESIGNING

& Values Coaching

*FOR FINANCIAL PLANNERS,
TEAMS, CLIENTS AND FAMILIES.*

with Cate Americano

INSPIRING AND
HELPING YOU TO LIVE
MORE IN ALIGNMENT
WITH YOUR VALUES SO
YOU CAN LIVE A
HAPPIER, MORE
MEANINGFUL AND
SUCCESSFUL LIFE.

Name

DATE:

live THE dream.

Our wish for you is that you walk away knowing more about yourself than you did before, and you feel empowered to create your own version of a happy, meaningful, and successful life, so you can *live a life* by design not by default.

If happiness is a pre-cursor to success; it therefore begs the question, **how happy are you?** Are you living your dream life, are you being the best version of you? Are you living a life by design or by default? What does your version of happiness and success look like?

Answering these questions, discovering your Values and Wheel of Life will help you define what your ideal life looks like and then enables you to build a plan to achieve it.

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Values

What are values and why are they important?

Your **Values** represent what is important to you in life. Knowing your values helps you understand what drives you, what you enjoy, what inspires you, and what you would like more of. By building a life and lifestyle around your values you create a life that is satisfying and meaningful to you.

Values are **beliefs or ideals** about what is good or bad and desirable or undesirable. Values have a major influence on a person's behavior and attitude and serve as broad guidelines in all situations. businessdictionary.com/definition/values

Our values are important because they **define** us. They **inform our thoughts, words and actions** and help us make decisions about how to live our lives. They help us to grow and develop and they help us to create the future we want to experience.

Every individual and every organisation is involved in making hundreds of decisions every day. The decisions we make are a reflection of our values and beliefs, and they are always directed towards a specific purpose. That purpose is the satisfaction of our individual or collective (organisational) needs. When we use our values to make decisions, we make a deliberate choice to focus on what is important to us. When values are shared, they build internal cohesion in a group. valuescentre.com

Why is living in alignment with your values important?

For those who want to be the best version they can be in various roles they have in life, living in alignment is critical. Our values often change over time so it is good to redo them each year. It is also wonderful to share with your family and friends and colleagues. It is amazing what you discover about one and another.

Living in alignment is about matching your 'real behaviors' with your 'ideal values'. Living out of alignment is a source of stress, dissatisfaction, and poor decision-making. Think2Perform.com

When you identify your values, it is important to think about the 'ideal you' and the 'real you' or another way to put it is 'current you' versus 'future you'. With some people, they are closely matched and with others, they are out of alignment.

“When your values are clear to you, making decisions BECOMES EASIER.”

ROY E. DISNEY

My VALUES



In this exercise, identify your own personal Values by thinking about the 'ideal and real you'. From the list below **circle 10 Values** that resonate with you most.

Abundance	Clarity	Diligence	Freedom	Integrity	Peace	Significance
Accountability	Comfort	Diversity	Friendship	Intelligence	Perfection	Simplicity
Achievement	Community	Education	Fulfillment	Intimacy	Persistence	Spirituality
Action	Competence	Effectiveness	Fun	Kindness	Philanthropy	Spontaneity
Adventure	Competition	Empathy	Gratitude	Knowledge	Play	Stability
Ambition	Connection	Energy	Growth	Leadership	Pleasure	Status
Autonomy	Contribution	Enthusiasm	Happiness	Legacy	Power	Strength
Awareness	Control	Environment	Harmony	Liveliness	Privacy	Success
Balance	Cooperation	Ethics	Health	Love	Recognition	Teamwork
Beauty	Courage	Excellence	Helping Others	Loyalty	Relationships	Tradition
Being the Best	Creativity	Excitement	Honesty	Meaningful Work	Religion	Truth
Calmness	Curiosity	Fairness	Honour	Money	Respect	Trustworthiness
Challenges	Decisiveness	Fame	Humility	Nature	Safety	Vitality
Change	Determination	Family	Independence	Order	Security	Wealth
Cheerfulness	Development	Flexibility	Inspiration	Passion	Service	Work Ethic

My PERSONAL VALUES ~ SCORECARD

List your **Top 5 Values** below and rank them in order of priority. Write down what they mean to you. Rate how well you are living in alignment with these Values, *1 = Not living in alignment* and *10 = You are living in alignment*. What could you do to rate 2 points higher? Detail what actions you can take over the coming 12 months to achieve this.

PRIORITY	VALUE	DEFINITION: What does this value mean to me?	How well am I living in alignment?	How could this value rate 2 points higher? What actions could I take this year to achieve it?
1			/10	
2			/10	
3			/10	
4			/10	
5			/10	

Top 3 VALUES TO FOCUS ON IN THE NEXT 12 MONTHS

1

2

3

My COMPANY VALUES ~ SCORECARD



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List your **Top 5 Values** below and rank them in order of priority. Write down what they mean to you. Rate how well the team are living in alignment with these Values, *1 = Not living in alignment* and *10 = You are living in alignment*. What could we do to rate 2 points higher? Detail what actions you can take over the coming 12 months to achieve this.

PRIORITY	VALUE	DEFINITION: What does this value mean to me?	How well are we living in alignment?	How could this value rate 2 points higher? What actions could we take this year?
1			/10	
2			/10	
3			/10	
4			/10	
5			/10	

Top 3 VALUES
TO FOCUS ON IN THE
NEXT 12 MONTHS



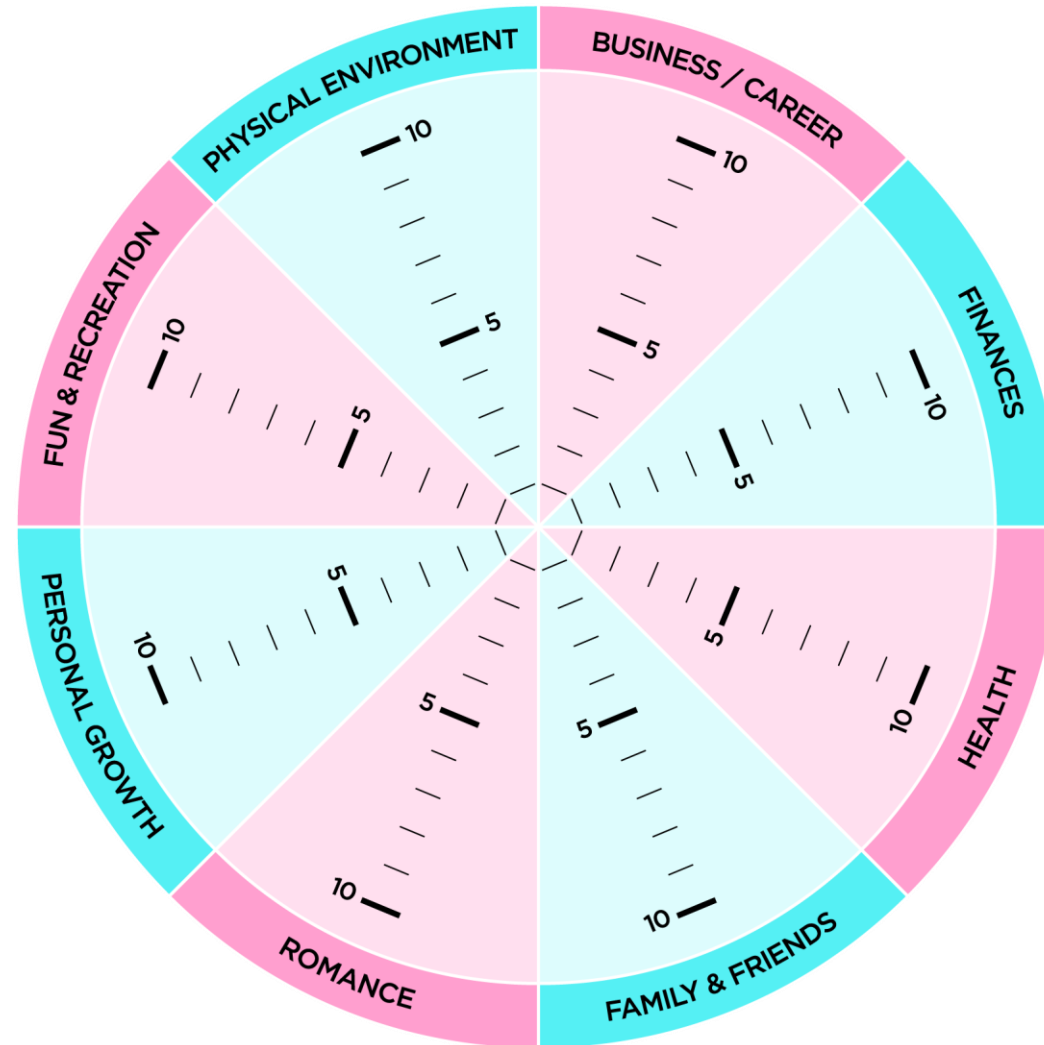
My WHEEL of LIFE

How happy are you?

There are 8 sections in the Wheel of Life that represent different aspects of your life. **Rate your satisfaction with each section, 1 = least satisfied and 10 = most satisfied.**

Draw a line to connect the dots between each rating. The new perimeter represents your Wheel of Life. Have a look at your Wheel, if this were a real wheel, how bumpy a ride would it be? How balanced is your life?

What actions would you need to take to rate 2 points higher?



Top 3 AREAS
TO FOCUS ON IN THE
NEXT 12 MONTHS



1

2

3

“
And in the end, it's
not the years in your life
that count, it's the
**LIFE IN YOUR
YEARS.**”

ABRAHAM LINCOLN

live THE dream.

“
What lies behind us
and what lies ahead of us
are tiny matters
compared to what lies
WITHIN US.

RALPH WALDO EMERSON



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