



THE SAVVY FINANCE COACH

The WHY Worksheet

Developing *your* personal definition of financial success (a.k.a. wealth) and focusing on the values that are most important to *you* (your purpose, your “why”), will be the propellant to your financial success. The stronger your “why”; the stronger your desire will be to win.

Designing your financial goals and principles in alignment with the values that are most important to you will bring more peace and contentment to your life.

What does financial success mean to you? What does your life look like when you are “wealthy”?

What is the single most important thing to you and why?

What are two other really important values to you and why?

Do you get emotional when you think about your answers? Are you willing to fight for what you wrote down? Identifying your “why” is a process, not an event. This may take several tries and some soul searching to develop fully. Journalling can help.

Keep this worksheet where you can see it daily as a reminder of “why” you are doing what you are doing. Better yet, create a vision board or motivational poster to help you maintain your intentionality.

Example Values

Abundance	Fame	Kindness	Self-respect
Achievement	Family	Knowledge	Sophistication
Adventure	Freedom	Leadership	Spirituality
Authority	Friendships	Legacy	Spontaneity
Balance	Gratitude	Love	Stability
Challenge	Health	Nature	Success
Community	Helping others	Organization	Trust
Competence	Honesty	Recognition	Wealth
Competition	Honor	Reputation	Wisdom
Creativity	Independence	Responsibility	Work/life balance
Excellence	Integrity	Security	