Task: Values and Spending Survey

NAME: **DATE:**

Directions: Below you will find a list of 45 unique pairs comparing two of 10 different values. Consider the question, "If all of your bills were paid, and you 'found' an extra $100, what would you spend it on?"

Circle one value for every pair that represents your preference. (NOTE: There are no wrong or trick answers. This exercise will simply give an indication about your spending values.)

8. Recreation (sports/ hobbies) 5. Charity	6. Travel 7. Education/Children	9. Social Activities 7. Education/Children
9. Social Activities 3. Clothes/Accessories	1. Savings/Investments 9. Social Activities	6. Travel 2. Food/Eating Out
1. Savings/Investments 4. Household	8. Recreation (sports/hobbies) 4. Household	10. Personal Appearance 9. Social Activities
7. Education/Children 3. Clothes/Accessories	2. Food/Eating Out 9. Social Activities	3. Clothes/Accessories 6. Travel
2. Food/Eating Out 4. Household	4. Household 3. Clothes/Accessories	8. Recreation (sports/hobbies) 10. Personal Appearance
5. Charity 10. Personal Appearance	3. Clothes/Accessories 5. Charity	6. Travel 4. Household
1. Savings/Investments 8. Recreation (sports/hobbies)	8. Recreation (sports/hobbies) 9. Social Activities	7. Education/Children 1. Savings/Investments
7. Education/Children 4. Household	5. Charity 4. Household	10. Personal Appearance 4. Household
2. Food/Eating Out 8. Recreation (sports/hobbies)	6. Travel 1. Savings/Investments	7. Education/Children 8. Recreation (sports/hobbies)
10. Personal Appearance 2. Food/Eating Out	9. Social Activities 4. Household	3. Clothes/Accessories 2. Food/Eating Out
9. Social Activities 5. Charity	6. Travel 10. Personal Appearance	5. Charity 7. Education/Children
10. Personal Appearance 3. Clothes/Accessories	10. Personal Appearance 1. Savings/Investments	3. Clothes/Accessories 1. Savings/Investments
1. Savings/Investments 5. Charity	5. Charity 6. Travel	9. Social Activities 6. Travel
8. Recreation (sports/hobbies) 3. Clothes/Accessories	2. Food/Eating Out 1. Savings/Investments	10. Personal Appearance 7. Education/Children
2. Food/Eating Out 5. Charity	8. Recreation (sports/hobbies) 6. Travel	2. Food/Eating Out 7. Education/Children

Task: Values and Spending Survey

A. Add up the number of times you picked each option and write it here:

B. Now rank the categories by writing the item having the greatest number next to number 1. If there is a tie, write the items in the order of your choosing.

Charity _____

Clothes/Accessories _____

Education/Children _____

Food/Eating Out _____

Household _____

Personal Appearance _____

Recreation _____

Savings/Investments _____

Social Activities: _____

Travel _____

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____

9. _____

10. _____

List B reflects the items you consider **most important** in their order of importance. Knowing this can help you set priorities for your financial decisions and planning.

Compare this priority list to your recent financial decisions and goals. How do your values and priorities match your recent spending and saving actions?

TIP: Keep this list available to reference as you make money decisions.