



# Finances: Values Quiz



## PARTNER 1

Rate your current values on the following scale:

- |  |      |   |   |   |   |   |   |      |
|--|------|---|---|---|---|---|---|------|
| 1. Nice holidays, upgraded car, and new tech is important to me. | Nope | 1 | 2 | 3 | 4 | 5 | 6 | Yes! |
| 2. A high income is important to me.                             | Nope | 1 | 2 | 3 | 4 | 5 | 6 | Yes! |
| 3. Living in a 'nice' area is important to me.                   | Nope | 1 | 2 | 3 | 4 | 5 | 6 | Yes! |
| 4. Status and affluence are important to me.                     | Nope | 1 | 2 | 3 | 4 | 5 | 6 | Yes! |
| 5. A good credit rating is important to me.                      | Nope | 1 | 2 | 3 | 4 | 5 | 6 | Yes! |
| 6. Having insurance is important to me.                          | Nope | 1 | 2 | 3 | 4 | 5 | 6 | Yes! |
| 7. Money in the bank and saving regularly is important to me.    | Nope | 1 | 2 | 3 | 4 | 5 | 6 | Yes! |
| 8. Freedom to travel and spend as I please is important to me.   | Nope | 1 | 2 | 3 | 4 | 5 | 6 | Yes! |
| 9. Being able to work on my own terms is important to me.        | Nope | 1 | 2 | 3 | 4 | 5 | 6 | Yes! |
| 10. Having a comfortable income is important to me.              | Nope | 1 | 2 | 3 | 4 | 5 | 6 | Yes! |

### PROSPERITY

Questions 1-4

Add up answers, divide by 4: ●

### SECURITY

Questions 5-7

Add up answers, divide by 3: ●

### FREEDOM

Questions 8-10

Add up answers, divide by 3: ●



# Finances: Values Quiz



## PARTNER 2

Rate your current values on the following scale:

- |  |      |   |   |   |   |   |   |      |
|--|------|---|---|---|---|---|---|------|
| 1. Nice holidays, upgraded car, and new tech is important to me. | Nope | 1 | 2 | 3 | 4 | 5 | 6 | Yes! |
| 2. A high income is important to me.                             | Nope | 1 | 2 | 3 | 4 | 5 | 6 | Yes! |
| 3. Living in a 'nice' area is important to me.                   | Nope | 1 | 2 | 3 | 4 | 5 | 6 | Yes! |
| 4. Status and affluence are important to me.                     | Nope | 1 | 2 | 3 | 4 | 5 | 6 | Yes! |
| 5. A good credit rating is important to me.                      | Nope | 1 | 2 | 3 | 4 | 5 | 6 | Yes! |
| 6. Having insurance is important to me.                          | Nope | 1 | 2 | 3 | 4 | 5 | 6 | Yes! |
| 7. Money in the bank and saving regularly is important to me.    | Nope | 1 | 2 | 3 | 4 | 5 | 6 | Yes! |
| 8. Freedom to travel and spend as I please is important to me.   | Nope | 1 | 2 | 3 | 4 | 5 | 6 | Yes! |
| 9. Being able to work on my own terms is important to me.        | Nope | 1 | 2 | 3 | 4 | 5 | 6 | Yes! |
| 10. Having a comfortable income is important to me.              | Nope | 1 | 2 | 3 | 4 | 5 | 6 | Yes! |

### PROSPERITY

Questions 1-4

Add up answers, divide by 4: ●

### SECURITY

Questions 5-7

Add up answers, divide by 3: ●

### FREEDOM

Questions 8-10

Add up answers, divide by 3: ●



# Finances: Values Questions

What was each partners ratings? Does this feel accurate? Why or why not?

What is one financial strength and one financial weakness for each partner?

How do your financial values match?

How do your financial values differ?

How can you financially improve together?  
Be specific.

