

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

9. Social Activities
3. Clothes/Accessories

1. Savings/Investments
4. Household

7. Education/Children
3. Clothes/Accessories

2. Food/Eating Out
4. Household

5. Charity
10. Personal Appearance

1. Savings/Investments
8. Recreation (sports/hobbies)

7. Education/Children
4. Household

2. Food/Eating Out
8. Recreation (sports/hobbies)

10. Personal Appearance
2. Food/Eating Out

9. Social Activities
5. Charity

10. Personal Appearance
3. Clothes/Accessories

1. Savings/Investments
5. Charity

8. Recreation (sports/hobbies)
3. Clothes/Accessories

2. Food/Eating Out
5. Charity

6. Travel
7. Education/Children

1. Savings/Investments
9. Social Activities

8. Recreation (sports/hobbies)
4. Household

2. Food/Eating Out
9. Social Activities

4. Household
3. Clothes/Accessories

3. Clothes/Accessories
5. Charity

8. Recreation (sports/hobbies)
9. Social Activities

5. Charity
4. Household

6. Travel
1. Savings/Investments

9. Social Activities
4. Household

6. Travel
10. Personal Appearance

10. Personal Appearance
1. Savings/Investments

5. Charity
6. Travel

2. Food/Eating Out
1. Savings/Investments

8. Recreation (sports/hobbies)
6. Travel

9. Social Activities
7. Education/Children

6. Travel
2. Food/Eating Out

10. Personal Appearance
9. Social Activities

3. Clothes/Accessories
6. Travel

8. Recreation (sports/hobbies)
10. Personal Appearance

6. Travel
4. Household

7. Education/Children
1. Savings/Investments

10. Personal Appearance
4. Household

7. Education/Children
8. Recreation (sports/hobbies)

3. Clothes/Accessories
2. Food/Eating Out

5. Charity
7. Education/Children

3. Clothes/Accessories
1. Savings/Investments

9. Social Activities
6. Travel

10. Personal Appearance
7. Education/Children

2. Food/Eating Out
7. Education/Children

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

- Charity _____
- Clothes/Accessories _____
- Education/Children _____
- Food/Eating Out _____
- Household _____
- Personal Appearance _____
- Recreation _____
- Savings/Investments _____
- Social Activities: _____
- Travel _____

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.

- 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.