



Money Values Survey

Member name: _____

What would make you feel great? <i>Check one box for each item listed</i>		Not important	Somewhat Important	Very Important
I	Freedom to travel and enjoy life	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Owning my own business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Flexible working conditions and hours	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Always paying bills by the due date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Being unburdened by possessions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Always having money in my bank account	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Being independent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Having easy access to money	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A	Upscale life style	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Comfort and contentment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Wonderful vacations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Beautiful home, car and possessions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Entertaining lavishly	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Prestige and status	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Easy access to money/credit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	High disposable income	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
S	Always having money in my wallet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Consistent income	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Being able to save regularly	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	A financial plan and budget	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	A good credit rating	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Security in retirement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Little or no debt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Money in the bank and an emergency fund	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
G	Giving regularly to a religious/spiritual organization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Donating to favorite charities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Helping the less fortunate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Having free time to volunteer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Picking up the tab at dinner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Buying gifts for my family, children and friends	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Leaving a legacy when I am gone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Making a difference with my life	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Money Values Tally: Add up the number of checks in the "Very Important" column and note below:

I Independence _____

A Abundance _____

S Stability _____

G Generosity _____

Questions? We are here to help!

Call our Member Contact Center at (877) 937-2328.



right here right for you

CFCU.ORG | 877.937.2328