

I've been
meaning
to do that

Episode 2: Exploring your purpose

Let's start the conversation about your purpose.

Our podcast "I've been meaning to do that" is about turning your thoughts into action and taking meaningful steps so you can live your purpose. Your purpose is the "why" of your life, and once you know what it is, you can organize your life around it.

So let's reflect on your purpose. Just answer a few questions about your life and then identify your core values.

5 questions for exploring purpose

1. What experiences have had a big impact on my life?

2. What did I love doing as a child, and why?

3. What makes me happy as an adult, and why?

4. How do I define success?

5. How do I want to be remembered?

Your core values

Values are the roots of purpose. Where purpose is the “why” of your life, values are the “why” of your behavior and decisions. They provide the meaning behind your life’s purpose.

When you know your values and purpose, you can align them with your financial decisions. This can help you stay on course with your financial plan.

1 Circle the 10 values that mean the most to you. We’ve included a blank one at the end in case a core value important to you is missing from the list.

2 Put an “X” next to the five values that are the least important.

3 Answer the questions below.

Achievement	Adaptability	Affection	Beliefs	Collaboration
Education	Empathy	Endurance	Ethics	Family
Friendship	Generosity	Health	Honesty	Independence
Innovation	Intimacy	Loyalty	Nurture	Productivity
Recreation	Respect	Responsibility	Self-Development	Self-Preservation
Stewardship	Tradition	Unity	Work	_____

1. Of the 10 values that mean the most to you, which five are the most important?

2. Are there one or two key themes running through your choices of the most important values?

3. Are there one or two key themes running through your choices of the least important values?

4. Do you think your choices differ from those of the most important people in your life?

You’ve taken the first step in exploring your values and purpose. Now what?

Take the conversation to the next level with a financial advisor so that you can develop a plan that’s consistent with your aspirations. To find a Truist advisor, go to **Truist.com/finder**.

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