CORE VALUES IN THE SECOND WAVE LIFE™

Your Second Wave Life™ will include investments in your Time, Talents, Treasure and Tribe. Before you make any significant investment in these areas, it is critical to identify values to which you will align the actions behind the investments. When you consider that, it should make complete sense: you're going to struggle to find true purpose, impact and fulfillment in something that doesn't align with who you are at the core, right?

This idea assumes that you have identified and are leveraging your core values. When it comes to values, it's true that business leaders fall into one of three categories:

a. A leader who has no idea what their core values are
b. A leader who has values hanging up on a sign in their office or lobby but don't truly align with them
c. A leader who has identified their business' core values and applies them to both their business and personal life

Depending upon which of these groups you feel you are in, your route to leveraging this tool will be different. If you are in the camp of never having done a core values discovery exercise you may find that extremely helpful. There are numerous resources available online, here is one example: www.discoveryourvalues.com/tvd. This step cannot be skipped, and I would encourage you to involve your family, loved ones, and your business leadership in the process.

If you either have not done core values discovery work or are in the camp where it is simply given lip service but not truly lived out, I want to encourage you to dig in and do the work before going farther. What would it look like to make changes in your life, business, relationships, and giving to reflect those values? I think you will find that the joy and perspective aligning your giving with your values brings in priceless.

My daughter works in philanthropy for a major bank, and we talk about the idea of investing your treasure and aligning it with your values frequently. She sees people who do so just to get the tax break, and conversely she also sees people give their treasure and find immense joy in the process. There are many families and individuals that have experienced a liquidity event, often from the sale of a business, and have no idea how to start when it comes to giving money away strategically. Many of my daughters' clients find that this gets easier and much more fun when they can create alignment between their core values and organizations that share these core values. These could be groups connected to your Tribe or groups that you find through some simple online research. By aligning discretional philanthropic giving to them, you will find greater connectivity to your Tribe and your own values.

The Values Guide is meant to help you identify which core values you want to align (or re-align) with as the foundation for your Second Wave Life™.

Instructions:

The values listed here are not comprehensive. You can also list values that you feel are important to you in the blank spaces if they are not already included.

Circle 5-10 values that you believe to be your Core Values. While there may be more you resonate with, focusing on a smaller number of values will empower you to draw each of them strategically into the following Tools. Too many values will be difficult to focus and will result in feeling like you are pulled into too many directions.

Once you have your Core Values circled, use the Top 10 chart to write each one down and identify a sentence that describes why these values are important to you.

Question to consider first:

Why did you choose to go into this business? What is the essence of what drew you to it or what you grew to love about it?

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The Values List

Circle the values listed that best reflect the values you live day-to-day.

Accessibility	Diligence	Fun	Open-mindedness	Sustainability
Accountability	Directness	Generosity	Ownership	Teamwork
Authenticity	Drive	Growth	Patriotism	Trust
Boldness	Education	Hard work	Performance	Uniqueness
Challenge	Efficiency	Health	Personal responsibility	Vision
Collaboration	Empathy	Helpfulness	Positivity	_____
Commitment	Empathy	Honesty	Prudence	_____
Compassion	Empower	Honor	Purpose	_____
Consistency	Empowerment	Humility	Quality	_____
Cost-conscious	Entrepreneurship	Image	Respect	_____
Courage	Environment	Impact	Respect	_____
Courtesy	Equality	Innovation	Safety	_____
Creativity	Ethical	Integrity	Satisfaction	_____
Curiosity	Excellence	Justice	Security	_____
Daring	Fair	Leadership	Simplicity	_____
Dependability	Flexibility	Learning	Spirited	_____
Determination	Focus	Mastery		

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Values Guide

Your SecondWave Life™ will include investments of Time, Talents, and Treasure. Before investing in any organization, purpose, or project, we find identifying an alignment of values helpful.

In our experience, leaders fall into one of three groups:

1. Has done no values discovery work
2. The core values for the business are hanging on a sign in the lobby, but the leader hasn't considered if they are the same as his/her personal values
3. Has identified the business' core values and is applying them to both the business and his/her personal life

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The Values List

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The purpose of this Values List is to aid you in identifying your personal values.

This is not a complete list and if your values are not included, we encourage you to fill them in within the "Other" spaces.

> *"Your core values are the deeply held beliefs that authentically* describe *your soul."*
>
> *– John C. Maxwell*

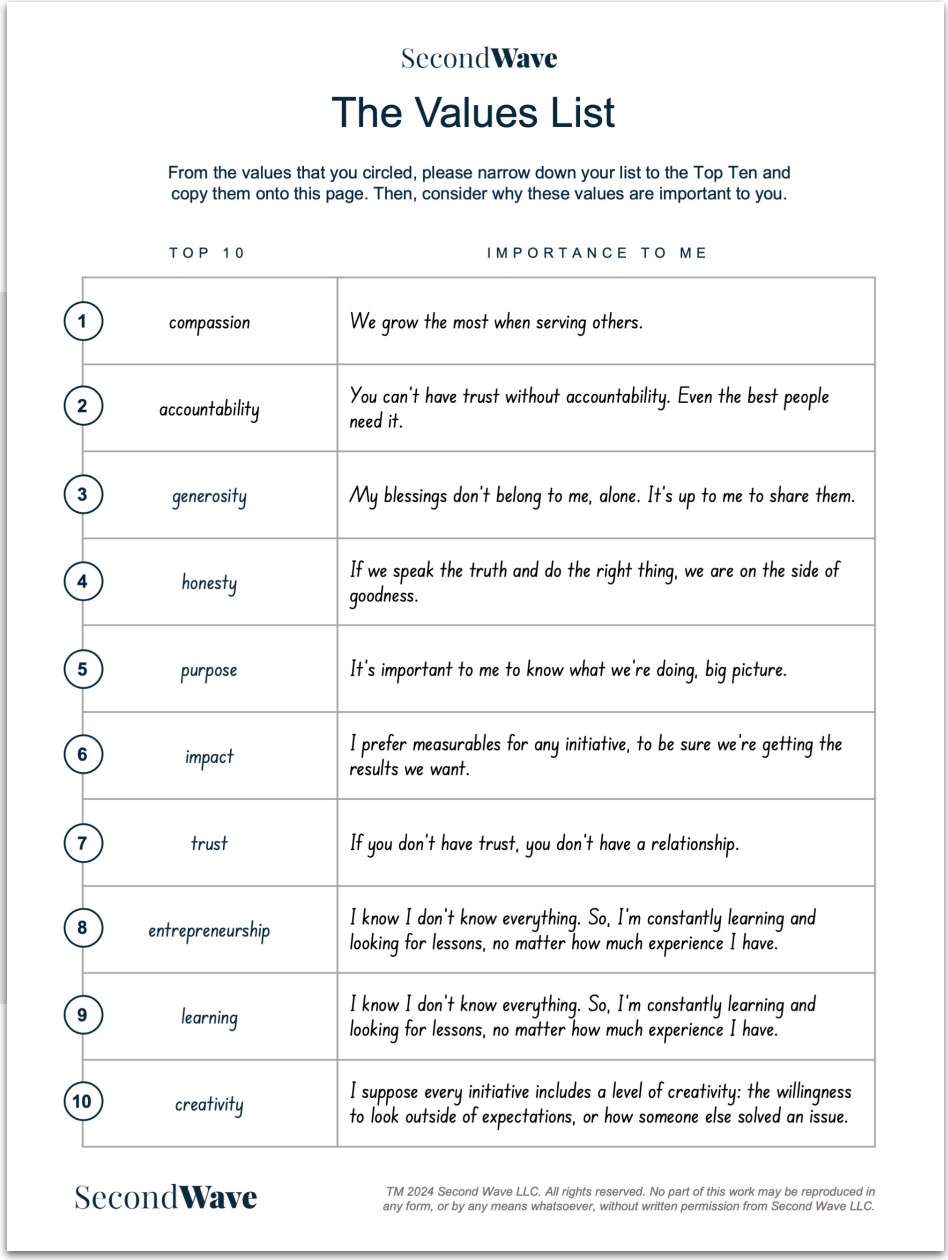
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Values Guide

Each value you choose is important to you for a different reason. By thinking through and writing down the importance of each value, you are identifying your own rules for living. As you plan-out your SecondWave Life™, your values will guide your decisions.

> *"Ultimately, the objective is to take a holistic approach to aligning the use of your Treasure to where you intend to have the most significant impact on your Tribes, leveraging your unique Talents and available Time commitment."*
>
> *– Andrew Williams*



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The Values List

From the values that you circled, please narrow down your list to the Top Ten and copy them onto this page. Then, consider why these values are important to you.

TOP 10		IMPORTANCE TO ME
1	compassion	We grow the most when serving others.
2	accountability	You can't have trust without accountability. Even the best people need it.
3	generosity	My blessings don't belong to me, alone. It's up to me to share them.
4	honesty	If we speak the truth and do the right thing, we are on the side of goodness.
5	purpose	It's important to me to know what we're doing, big picture.
6	impact	I prefer measurables for any initiative, to be sure we're getting the results we want.
7	trust	If you don't have trust, you don't have a relationship.
8	entrepreneurship	I know I don't know everything. So, I'm constantly learning and looking for lessons, no matter how much experience I have.
9	learning	I know I don't know everything. So, I'm constantly learning and looking for lessons, no matter how much experience I have.
10	creativity	I suppose every initiative includes a level of creativity: the willingness to look outside of expectations, or how someone else solved an issue.

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