

LUMIANT

Values Activity Training



8 Dimensions of Wellbeing



The state of being comfortable, healthy and happy

Understanding the 8 Dimensions of Wellbeing

Your Values

Goals change, values don't



- The underlying principles of who you are, how you live your life and what you believe is important
- Learning about what matters most to you is key to the decisions you make in life
- Living by your values is more meaningful and fulfilling
- Focus on what is important to you, where do you want to spend your energy, time and money
- Values keep you flexible whilst you achieve your goals, manage the setbacks and challenges
- Your values are your motivation. You're more likely to achieve your goals if they align with your values

Your Values Activity

Get to know Your Values

Think about your own personal life and financial decision-making.

Pair up with a colleague, family member or friend.

Each select your own top 5 values and order them from the most important to least.

Work with each other to unpack each others cards.

When discussing the Values cards ask:

- What each card means to you?
- Why you've chosen these particular cards?
- Why the card is so important to you?
- What do you need to progress that value in the next 12 months?

Get to know Your Values

Your Values Activity

- How did you feel being questioned?
- How did you feel asking those questions?
- Did you find out anything surprising?
- Did you hear any goals?

Your Values Activity

Get to know Your Values

- Practice with a colleague, a family member, friend or get stuck in with a live client
- Practice asking the 2 key questions; What does this card mean to you? Why is it so important to you?
- Develop your own line of follow up questions using our suggested questions
- Practice running a Values session using Lumiant
- Follow the [Protocol: Your Values session](#) to help guide you
- Listen and probe to flesh out the clients goals
- Attempt to capture [Goals](#) as you work through the session
- To learn more check out our [Lumaint Support Centre](#)

THE VALUES

**Spend without
guilt.**

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EMOTIONAL

**Nurture my
relationships.**

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EMOTIONAL

**Protect the
environment.**

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ENVIRONMENTAL

**Live in a
better place.**

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ENVIRONMENTAL

**Volunteer
my time.**

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SPIRITUAL

**Help others
live a more
purposeful life.**

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SPIRITUAL

**Be more
socially active.**

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SOCIAL

**Dedicate more
time to those
I care about.**

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SOCIAL

**Master new skills
or knowledge.**

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INTELLECTUAL

**Educate loved
ones.**

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INTELLECTUAL

**Make work
optional.**

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OCCUPATIONAL

**Pursue work
with purpose.**

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OCCUPATIONAL

**Avoid being a
burden on my
family.**

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PHYSICAL

**Become more
active & healthy.**

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PHYSICAL

**Feel confident in
my finances.**

LUMIANT

FINANCIAL

**Support & protect
those I love.**

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FINANCIAL

Spend without guilt.

- What does this mean to you?
- How do you feel about the way you normally spend your money?
- What would your life ideally look like if you could spend without guilt?
- How does your current spending compare with your desired spending?
- What do you currently do to monitor your spending?
- *Quantify* - How much would this cost you?
- What are the current barriers to you achieving this?

Nurture my relationships.

- What does this mean to you?
- Which relationships do you wish to nurture?
- Is this something you are currently doing, or needs changing?
- What would enable you to nurture your relationships?
- *Quantify* - How much would this cost you in allocated funds and time?
- What are the current barriers to you achieving this?

Live in a better place.

- What does your ideal living situation look like?
- How far away do you believe you are from achieving this?
- When do you wish to achieve this goal?
- *Quantify* - How much would your ideal living situation cost you?
- What are the current barriers to you achieving this?

Protect the environment.

- What do you mean by this?
- What would you ideally like to do to protect the environment?
- *Quantify* - What would this look like in terms of money and time?
- What are the current barriers to you achieving this?

Feel confident in my finances.

- What do you mean by this?
- How do you wish to feel in relation to your finances?
- What would make you confident?
- What things would you like to do, that you currently are not, that will increase your confidence?
- *Quantify* - What would this look like in terms of money and time?
- What are the current barriers to you achieving this?

Support & protect those I love.

- What does supporting and protecting mean to you?
- Who do you have in mind when you select this value, if anyone specific?
- If there are specific people you wish to support, what are their needs?
- *Quantify* - What would you ideally like to allocate to supporting and protecting your loved ones? How regularly? What are the costs and timing of this support?
- What effect on your time and money are you happy to have in order to achieve this goal?

Master new skills or knowledge.



INTELLECTUAL

- What do you have in mind for new skills or knowledge? Is this a hobby, a career change, further education, etc.?
- What effect on your time and money are you happy to have in order to achieve this goal.
- When are you looking to engage in this goal?
- *Quantify* - What will the costs be in financial investment, and time away from work?
- How regularly will these costs be, and over what time period?

Educate loved ones.



INTELLECTUAL

- Do you have specific loved ones in mind that you wish to help with their education?
- What effect on your time and money are you happy to have in order to achieve this goal.
- *Quantify* - What will the costs be in financial investment, and time if required? How regularly will these costs be, and over what time period? When are you looking to support these loved ones through education?

Make work optional.



OCCUPATIONAL

- Are you looking to retire, semi-retire, work fewer hours, change what work means for you, etc.?
- What timeline are you thinking to achieve this goal?
- What effect on your time, money, and living standards are you happy to have in order to achieve this goal? (i.e. this may mean a decrease in income, living off existing assets)
- *Quantify* - How much do you wish to live on weekly, and where do you wish to draw funds from?

Pursue work with purpose.



OCCUPATIONAL

- Do you have a specific line of work in mind?
- What is your ideal timeline for this work? Are we planning for the future, or organising it now?
- What effect on your time, money, and living standards are you happy to have in order to achieve this goal? (i.e. this may mean a decrease in income, living off existing assets)
- *Quantify* - How much do you wish to live on weekly?
- *Quantify* - What are the costs to pursue this work? (e.g. upfront investments and time out of work)

Dedicate more time to those I care about.



SOCIAL



- Do you have specific people in mind that you wish to spend time with?
- How much time are you currently dedicating to this, and how does it compare with your ideal state?
- *Quantify* - How much time are you wishing to dedicate? What are you giving up in order to redirect this time?
- *Quantify* - What are the costs to dedicate this time? (e.g. funds and time out of work)

Be more socially active.



SOCIAL



- What does this mean to you?
- How socially active would you say you currently are?
- How socially active would you like to be?
- What kinds of activities do you wish to participate in when you're more socially active?
- *Quantify* - How much money are you wishing to dedicate to this goal?
- What are the current barriers to you achieving this?

Become more active & healthy.



PHYSICAL

- What does being active and healthy mean to you?
- Why is this important to you? Has this changed over time? Have there been any changes? What prompted this value?
- How do you see this value manifesting in your life?
- What do you currently do to ensure an active and healthy lifestyle?
- What other activities would you like to bring into your life?
- *Quantify* - How much time are you wishing to dedicate? What do these activities cost?

Avoid being a burden on my family.



PHYSICAL

- What does this mean to you? What situation specifically are you avoiding?
- Why is this value meaningful to you? What triggered this thought process?
- If there were to be an accident or unfortunate situation, what would you like to happen in terms of your finances?
- What are your concerns if you were no longer able to contribute to your family's wealth?
- What are you currently doing to mitigate this risk? (e.g. disability insurance, benefits, etc.)
- What would you like taken care of, to avoid burdening the family?
- *Quantify* - How much would this cost on an ongoing basis? For how long?

Help others live a more purposeful life.



SPIRITUAL



- What does this mean to you?
- How do you wish to help with this goal?
- Do you have specific people or groups in mind that you would like to contribute to?
- Quantify - What kind of contributions do you wish to make? Time or money? How much and for how long?
- How are you currently doing this, and how does it compare with your ideal state?
- *Quantify* - What are the other associated costs? (e.g. time out of work)

Volunteer my time.



SPIRITUAL



- Why do you wish to volunteer your time?
- Do you have specific causes you wish to dedicate your time to? Why is this?
- How much time are you currently dedicating to this, and how does it compare with your ideal state?
- *Quantify* - How much time are you wishing to dedicate? What are you giving up in order to redirect this time?
- *Quantify* - What are the costs to dedicate this time? (e.g. funds and time out of work)

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Thank you

