

WORKSHEET

Core Values

Please copy this sheet into a new document for yourself.

Overview

This worksheet will help you identify and express the values that guide your decisions and actions. Having a clear sense of purpose is essential as you work towards closing the racial wealth gap. As you move through these steps, you will create meaningful statements that ground your work and inspire alignment between your resources and your values. Think of your values statements as a compass—steadily guiding you through challenges and choices alike.

3 Steps to Create Values Statements

1. Recall moments in your life when you acted in alignment with your beliefs and values.
2. Reflect on these stories to articulate the beliefs and values that you hold.
3. Draft statements that will guide you in your action commitments around closing the racial wealth gap.

Step 1: Recall Moments from Your Life

Think about times when you acted in alignment with your values, when you acted as your best self – moments when you felt proud of who you were, aligned with your beliefs, had a sense of meaning or purpose. These may be from any age or stage of your life. Jot down headlines (or fuller descriptions) of as many specific moments, situations or actions as you can recall.

In addition to any miscellaneous moments that come up, try to recall moments connected to your identities (for ex. being a girl/woman in the face of sexism and patriarchy, or as a white person in a racial situation.)

If you feel stuck or have limited responses, consider the prompts below:

- Reference times when you witnessed *someone else* taking action from a core belief.
- What motivates you to take action, especially in challenging situations?
- What do you consider first when making important decisions or choices? About money?
- What causes or issues that stir strong emotions in you? What values do they reflect?
- What experiences reflect the values you want to leave as your legacy?

Moments from your life:

Focus on stories in relation to money and material resources. Reflect on 1-3 times when you acted in accordance with your values or beliefs in relation to money (at any age, of any amount).

Stories about money:

Step 2: Reflect on Your Stories

Clarify and articulate what values and beliefs guide you. Look back at all of your stories and try to identify the core beliefs, values or themes that emerge. For example, you might notice:

- *Feelings: hope, solidarity, bravery, connection to others;*
- *Beliefs: I have more than I need, I am powerful, one should always do the “right” thing;*
- *Values: integrity, honesty, treating people with dignity, interconnectedness.*

Consider:

- Sharing your stories with a friend or partner and see if they can help you cull the core beliefs;
- Reviewing the list at the end of this worksheet for language to get inspired.

Words and/or phrases that reflect your values and beliefs:

Step 3: Core Values Statements

Draft values statements for your work on closing the racial wealth gap, working from your list of core beliefs/values in Step 2. The goal is to have an anchor to return to when making decisions about your resources. It should be clear, meaningful to you, and aligned with your principles. Don’t worry about how it sounds to others—it only needs to resonate for you. They can be aspirational but should not be performative.

Note: We call these “core values statements,” but use whatever term works for you. The title isn’t important—choose what feels right and keeps you moving.

Core Values Statements

- 1.
- 2.
- 3.

Core Values Inspiration List

This list of common values and their definitions can help you articulate your values statements. Some of these have secondary definitions that foreground their relationship to our closing the racial wealth gap. This list is meant to help support and inspire you and is by no means comprehensive!

Alignment: Harmony between actions, values, and goals.

Authenticity: Being true to oneself and genuine in actions.

In relation to the racial wealth gap (RWG): The practice of centering lived experiences, cultural identity, and community voices in wealth-building efforts, ensuring solutions are rooted in real needs and values.

Achievement: Reaching a goal through effort and skill.

Adventure: An exciting, bold, or risky experience.

Autonomy: Independence in decision-making and action.

In relation to RWG: The capacity for historically marginalized communities to make independent economic decisions, control resources, and shape their own financial futures without systemic constraints.

Balance: Maintaining stability among different life aspects.

Beauty: A quality that pleases the senses or mind.

Being a steward of the earth and all living things: Caring for the Earth and all living beings with respect, responsibility, and a commitment to sustainability for future generations.

Bravery: The courage to face fear, danger, or challenges, even when it's hard.

In relation to RWG: Willingness to confront systemic injustice and speak out against inequality, even when it's uncomfortable or unpopular.

Collaboration: Working together with others to achieve shared goals.

Community: A group of people connected by shared values, interests, or place

Compassion: Caring deeply about others and taking action to ease their suffering.

Courage: Choosing to act with strength and integrity, even in the face of fear or difficulty.

Creativity: Using imagination and new ideas to solve problems or express something meaningful.

Empathy: The ability to understand and share the feelings of another person.

In relation to RWG: Understanding and valuing the lived experiences of communities impacted by racial economic disparities.

Equity: Ensuring fair access to resources and opportunities for historically marginalized communities.

In relation to RWG: Providing targeted resources, opportunities, and support to historically marginalized communities to level the economic playing field

Fairness: Treating people justly and without bias.

Integrity: Being honest, ethical, and consistent in actions and values.

Justice: Ensuring fairness, equality, and the protection of rights—especially for those who have been marginalized.

Leadership: Guiding and inspiring others toward positive change with vision and accountability.

Learning: Gaining knowledge, growing from experience, and staying open to new ideas and perspectives.

Patience: Showing calm and persistence, especially when progress is slow or challenges arise.

Peace: Creating conditions of harmony, safety, and well-being within and among communities.

Pleasure: Embracing joy, fulfillment, and well-being as essential parts of a healthy life.

Repair: Taking action to acknowledge and correct harm.

In relation to RWG: Acknowledging past and present harms caused by racial injustice and taking deliberate steps to address and correct them.

Respect: Honoring the dignity, culture, and contributions of others.

Responsibility: Being accountable for your actions and their impact.

In relation to RWG: Owning the role individuals, institutions, and governments play in maintaining or dismantling economic disparities—and committing to action.

Safety: Protecting oneself and others from harm or danger, and ensuring secure environments for all.

Security: Having stability and protection—especially economic and emotional—so people can thrive without constant fear or uncertainty.

Self-Respect: Valuing yourself and standing up for your dignity, needs, and worth.

Service: Acting to help others and contribute to the greater good, often without personal gain.

Shared Power: Distributing decision-making and influence fairly so everyone has a voice.

Solidarity: Standing together with others in support and mutual commitment.

Sample Values Statements

Below are some sample values statements in a range of styles to help inspire you. Craft your statement so that it resonates with you.

Curiosity

I lean into my desire to learn. I strive to set aside my assumptions and work to understand the individual experiences and perspectives of the individuals and communities I engage with.

We step into each conversation with open hands and open hearts, setting aside the weight of assumption. Each voice we meet is a world unfolding, and we lean in to listen.

Integrity

I believe that all people are inherently good—including rich people. I commit to staying grounded in my own goodness and to making decisions with integrity, connection, and curiosity. I strive to be guided by justice and equity—not by guilt, shame, or the need to perform.

Wealth doesn't erase humanity. I see the spark of goodness in every person, even in places where power and wealth reside. I move through the world with open hands—guided by truth, by justice, by the pull of connection and the light of curiosity. I will not be swayed by guilt or shame, nor will I perform for praise. I act with heart, and I act to heal.

Shared Power

We design our decision-making and resource-sharing practices to move away from traditional hierarchies. We're committed to creating systems where power is equitably distributed and BIPOC leadership is supported and centered.

Power hoarding? Nah. Power sharing? Always.

Truth Telling / Honesty

Expose the roots, fund the future. I speak up, plug folks in, and back tools that break the cycle of the racial wealth gap. Because justice isn't charity, it's change.

I believe everyone should have access to clear, accurate information about how our society works—including systems of oppression. I commit to speaking truth to power about economic injustice. I want to support individuals and communities who challenge and dismantle the systems that perpetuate racialized economic inequality.