



Values Assessment Exercise

Understanding your values — what gives you meaning and motivates you — will help you make informed decisions about what you want in retirement.

Step 1: Values Checklist

Review and place a check mark next to your top six to eight Activity-Based Values column below. These values are critical to identifying the work activities that will be most satisfying to you. Then identify six to eight Lifestyle and Environment Values in the right column. These values are important to identifying the activities and a lifestyle that will be most satisfying to you.

Activity-Based Values	Life Style and Environment Values
Competition	Time Flexibility
New Ideas/Learning	Independence
Self-Expression	Recognition
Help Others	Teamwork
Power and Influence	Variety
Supervision	Achievement
Physical Challenge	Financial Security
Mastery/Expertise	Relaxation
Artistic Expression	Volunteering
Altruism	Family
Detailed	Friendships
Adventure	Autonomy
Intellectual Challenge	Spirituality
Creativity	Health/Fitness
Contributing	Location
Achievement	Structure
Organization	Community
Leadership	Exploration

Step 2: Activity-Based Values

Review the checkmarks from the top six to eight activity-based values you selected on the previous page in the Activity-Based Values column below. Your values will most likely correspond to two or three Value Groups in the middle column. If your top values fall into more than three Value Groups, decide which three Value Groups best describe your strongest values. Then in the right column write a personal definition for each checked Activity-Based Value and identify an experience in which these values were met.

Activity-Based Values	Value Groups (SkillScan's Skill Categories and Holland Themes)	Personal Definition and Experience
Adventure Competition Physical Challenge	Physical/Technical Holland – Realistic theme	
Intellectual Challenge Mastery/Expertise New Ideas/Learning	Analytical Creative Holland – Investigative theme	
Artistic Expression Creativity Self-Expression	Creative Holland – Artistic theme	
Altruism Contributing Help Others	Relationship Communication Holland – Social theme	
Achievement Leadership Power and Influence	Management/Leadership Communication Holland – Enterprising theme	
Detailed Organization Supervision	Analytical Management Holland – Conventional theme	

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Step 3: Lifestyle and Environment Values

For each of the top six to eight Worklife and Environment Values that you checked in Step 1, in the right column provide a definition followed by an experience in which this value was met.

Top Worklife and Environment Values	Personal Definition and Experience