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Goals -- whether they are personal, professional or financial -- give us a target to aim for, as we strive for significant accomplishments.

Values help define what we believe to be most meaningful, and can provide the standards for how we live.

This month's InFocus looks at values and goals from different angles and the importance of having them intersect.



CONNECT YOUR VALUES AND GOALS

What's most important to you? Who do you admire the most, and why? What are your most important goals in life?

In this video, **Katie Keary**, a wealth advisor with the BAM ALLIANCE, poses these questions and offers exercises that you can take to help you make sure that your values and goals are in sync.



TIPS FOR ESTABLISHING POWERFUL GOALS



SUCCESS.com shares the thoughts of the late Jim Rohn, an author and prominent business philosopher for more than 45 years, on the importance of having goals:

"Goal setting is powerful because it provides focus. It shapes our dreams. It gives us the ability to hone in on the exact actions we need to perform to achieve everything we desire in life. Goals are great because they cause us to stretch and grow in ways that we never have before. In order to reach our goals, we must become better."

Read Rohn's tips for setting goals.

| [RELATED: 10 tips for setting your greatest goals](#)

YOUR VALUES, YOUR FINANCIAL PLAN

What role should your values play in your financial plan? A big one, says **Tim Maurer** of the BAM ALLIANCE. In his book "Simple Money: A No-Nonsense Guide to Personal Finance," he writes:

"Our values are simply the stuff in life that we want to be about. That which we want to define us. The guideposts we choose to live by.



They are the priorities that we hope will mark our time on this earth. They are the elements of life that motivate us; that when satisfied, bring us genuine contentment. Enough.

They are neither universal nor constant. Our values may, indeed, change as we change, but they are also not fleeting.

Values are critical in financial planning as anchors for our goals and boundaries for the actions we take to achieve them. But most of all, they make the hardest decisions in life much easier by helping us prioritize what truly is the most important.

Understanding what you value most will help simplify even the most complex financial decisions."

| [RELATED: Steps you can take to define your core values](#)

FINANCIAL GOALS TO SET NOW (AND WHY)



When it comes to setting financial goals, start early. This quick-hitting podcast from the Financial Industry Regulatory Authority offers four attainable goals for those who are just getting starting when it comes to saving and investing.

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