



Values Worksheet

Client Name: Make Taxes Fair

Date:

Step 1: Brainstorm good things to seek after

What qualities do you want your brand to be associated with?

Freedom
Integrity
Consistency
Innovation
Action

What's the fastest way an employee at your company could merit a raise? What actions would help them be considered for promotion?

An employee who shows curiosity and initiative to take action, to be proactive, and to apply knowledge.

People focused... human experience focused...

Example:

My employee **Mateo Fragata** was given an assignment to create a "decision tree" for a resource. He did the assignment and went beyond the assignment by finding links from the IRS that support the tool that was being developed.

He showed initiative and took ACTION without being asked.

Step 2: Brainstorm bad things you want to avoid

What qualities do you/your organization hate?

Inaction & laziness

What's the fastest way for an employee to get fired?

Do the minimum, miss assignments, not doing what they say they are going to do.

Step 3: List Values

List the values that you want your company/brand to embody. We recommend trying to stay between 3 and 10. For each value, try to turn it into an actionable statement (verbs are better than adjectives) instead of a single word. For instance, if the value you thought of was 'honesty' we could turn that into 'tell all of the truth, all of the time'.

Value	Statement
Freedom	Empower business owner to break free from needless tax burdens, so they can focus on growth and prosperity Break Their Shackles
Action	Take bold, proactive steps to simplify taxes, protect profits, and drive financial success without delay. Proactively Take Bold Action
Embracing Our Humanity	Prioritize genuine relationships, empathy, and respect for each client's unique journey—always putting people first Service with compassion for the human experience. Entrepreneurship is filled with stress, overwhelm, and constant pressure. We embrace our humanity and approach serving our community in a thoughtful and intentful manner. Enjoy the struggle Serve People Even When its Difficult
Integrity	Conduct every interaction ethically and transparently, ensuring trust, fairness, and uncompromising standards Do the right thing – NO MATTER WHAT
	Friends don't let friends overpay on taxes

	You deserve more than a happy historian
Empowerment	<p>Seek Empowerment</p> <p>They say that knowledge is power and we couldn't agree more. Uncertainty and ambiguity cause doubt and fear but having knowledge empowers us to make confident decisions. We have committed our professional lives to understanding the tax code inside and out so we can erase the uncertainty and empower the business owners of America. Having a healthy top line in a business is great but a healthy bottom line means everything and we are here to protect the bottom line profits of American entrepreneurs.</p>
Appreciative	<p>Be Appreciative</p> <p>Appreciative is having a mindset of being happy and grateful for what you have. It doesn't mean you don't strive for more or continue to grow and improve. It means that wherever you are in life, you see it as a success rather than a failure and simply a stepping stone to the next level. Appreciate what you have, and you'll never get stuck looking back with a scowl. Instead, you'll be looking forward with a smile and propel yourself to the highest levels of achievement.</p>