



Financial DNA[®] Core Life Motivations Profile

Comparison Report for:
Helen Jones
and
Chris Coddington

Providing key insights into how you can
build a sound relationship together.

Date of Completion: 1-October-2008

Financial DNA® Comparison Report

01-October-2008

Introduction

We have prepared this Comparison Report based on the strengths and struggles highlighted in your Core Financial Life Profiles being "Engager" for Helen and "Strategist" for Chris.

The goal is to provide specific insights into your differences on how you will each naturally approach the financial planning process. For your advisor, spouse, partner and family this will provide more guidance on how to manage your expectations and how to best interact with you.

We have provided a graph on the next page which shows your different behavioral profile factor scores upon which this report is based. To review the differences and/or similarities in your sub-factor scores, please see Page 6.

Interpretation of this Report

In reviewing the report, please note the following points:

- The profile report reflects your natural behavior only. This behavior will generally remain consistent over time as it is the core of who you are. However, the report does not reflect how you may from time to time modify your behavior in certain situations based on experiences, education and values.
- There are no "good" or "bad" Unique Profiles. The key is how you can learn and make better decisions from greater personal awareness of who you are.
- The profile report is a tool only and should not be solely relied on for making any decision.
- The graph on the next page shows your scores for each behavioral factor in a range of 20 (left side) to 80 (right side). The "percentage score" in the brackets next to each score refers to the percentage of people in the population who score like you on this factor. Therefore, for each behavioral factor the closer your score is to 20 or 80 the lower your percentage score. This means the more progressively extreme the natural behavior is likely to be on each side. Scores closer to 50 indicate a more moderate style that is typically more flexible in that behavioral factor.
- **To the extent you have strong profile factors over 60 and under 40, there is a higher chance the behavioral insights in this report will be more consistently and intensively displayed when you are making life and financial decisions over a period of time.**

Helen, based on your profile scores, your two strongest profile factors are:

- * **Creative** - Explores possibilities, innovative, driven by ideas
- * **Outgoing** - Enjoys new ideas, expresses view, uses a networking approach

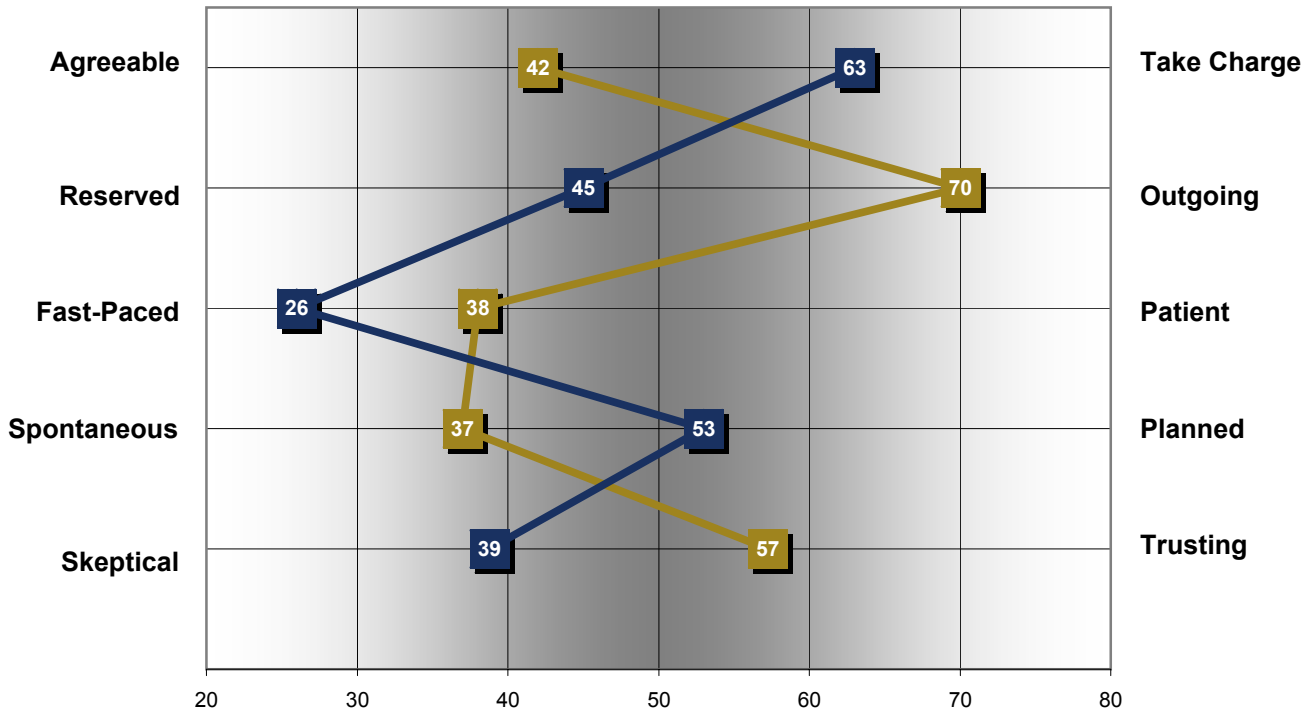
Chris, based on your profile scores, your two strongest profile factors are:

- * **Fast-Paced** - Objective, results driven, rational
- * **Risk Taker** - Venturesome, takes chances, optimistic

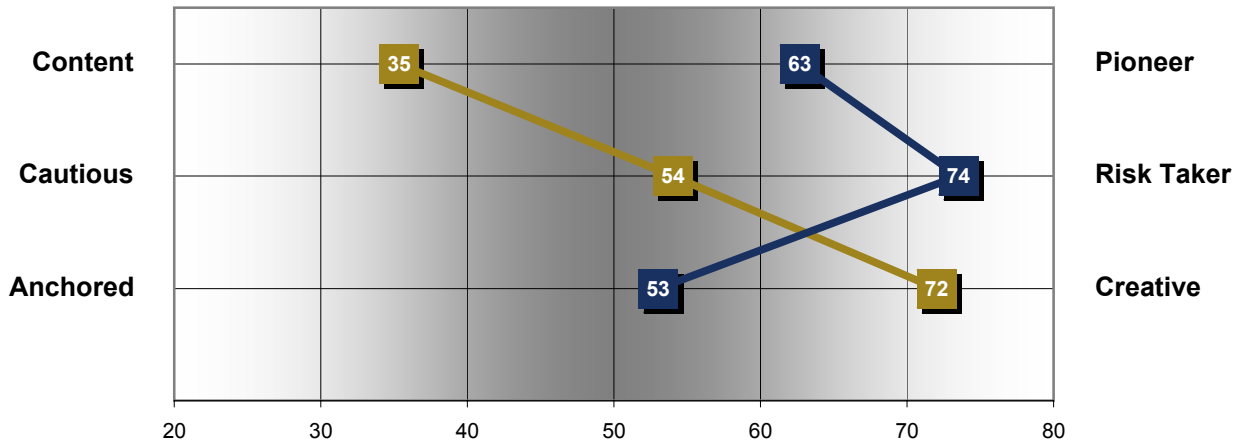
Helen

Chris

Core Financial Life Drivers



Financial Life Planning Drivers



Quality Life Behavioral Attitudes

Your natural motivations, desires and approach for building a Quality Life are often influenced by the strongest traits in your natural behavioral style. Based on the two strongest behavioral factors shown in your profile graphs on page 3 of this report, your primary Quality Life Behavioral Attitudes are summarized in the table below.

	Helen Jones	
	Core Life Attitude 1 Creative Factor	Core Life Attitude 2 Outgoing Factor
Communication	Brainstorm	Verbalize
Quality Life Outlook	Innovation	Fun loving
Activity Passion	Pursuing new ventures	Communication
Life Values	Continuous improvement	Enjoyment
Strength	Creative	Openness
Blind-spot	Easily bored	Expensive tastes
Wealth Creation Philosophy	Best solution	Lifestyle
Money Attitude	New ideas	Status seeking
Financial Goal Setting	The best way	Affluence
Planned Giving Motivation	New initiatives	Connections

	Chris Coddington	
	Core Life Attitude 1 Fast-Paced Factor	Core Life Attitude 2 Risk Taker Factor
Communication	Get to the point	High returns
Quality Life Outlook	Change	Adventure
Activity Passion	Task focus	Pursuing goals
Life Values	Logic	Competition
Strength	Rational	Has courage
Blind-spot	Impatient	Takes unnecessary risks
Wealth Creation Philosophy	Calculated	Pioneering
Money Attitude	High returns	Risk taker
Financial Goal Setting	Dynamic	Opportunistic
Planned Giving Motivation	Seeing outcomes	Having impact

Based on combinations of the behavioral factors in your profile graph shown on page 3 of this report, your natural approach to financial planning is set out in the table below.

Financial Planning Insights	Helen Jones	Chris Coddington
1. Sets the Agenda:	LOW	HIGH
2. Relationships:	HIGH	LOW
3. Results:	MEDIUM	HIGH
4. Risk Propensity:	MEDIUM	HIGH
5. Risk Tolerance:	HIGH	HIGH
6. Setting Goals:	LOW	HIGH
7. Pursuing Goals:	LOW	HIGH
8. Comfort with Change:	HIGH	HIGH
9. New Idea Driven:	HIGH	HIGH
10. Financially Organized	LOW	MEDIUM
11. Need for Information:	LOW	MEDIUM
12. Spender:	HIGH	MEDIUM
13. Need for Control:	MEDIUM	HIGH

In this report, we have provided you each with insights for how to modify your behavior and communication with each other. Also, we have provided what the other person's unique strengths and struggles are so that you are more aware of them and how they are similar or different to you.

Using the graph below, you, as "Engager" and "Strategist" Core Financial Life Profiles, will require more modification in your behavioral style.

In order to build a healthy relationship, consider showing appreciation for each others similarities and differences, and then modifying your behavior on the terms outlined below.

- Need to ensure that a relaxed environment is created so that both can safely contribute their ideas
- Adapt to work at a similar pace and create a shared commitment for the same vision and goals
- Need to remember that while one of you may interact a lot the other will need reflection time
- Need to recognize that one of you will connect with people easily and the other will stand-off and make observations
- Reinforce each others tendency to be combative and trigger conflict
- Have a straightforward relationship and operate at a fast pace
- Need to provide a set of rules for you both to operate with but allow some flexibility for changes in plans
- Benefit from one's high level on the spot approach and the follow through of the other to check out the details before moving forward
- Both be willing to take chances so may not readily see potential dangers
- Each have visionary ideas but will need to ensure they are implemented in concrete, realistic steps

Your Compatibility for Interacting Together

Overall, the graph below shows those persons you will most easily work with because you are generally closer in relationship style. Also, it shows those Core Financial Life Profiles for who you will have to more closely review how you each adapt because there are greater differences. Adapting your behavior to work with another person requires concentrating more on your level of self-awareness when you are with that person. However, when a person is different from you there are also many benefits because of their different perspectives. Whilst recognizing the natural behavior is important, also sharing common values, beliefs and attributes is important for building a successful relationship.

	Facilitator	Reflective Thinker	Influencer	Initiator	Community Builder	Engager	Strategist	Stylish Thinker	Relationship Builder	Adapter
Facilitator										
Reflective Thinker										
Influencer										
Initiator										
Community Builder										
Engager										
Strategist										
Stylish Thinker										
Relationship Builder										
Adapter										

	Minimal modification required
	Some modification required
	More modification required

Engager

Typically Works Easily With:
Community Builder, Engager

Review How You Adapt:
Reflective Thinker, Strategist

Strategist

Typically Works Easily With:
Initiator, Strategist

Review How You Adapt:
Facilitator, Community Builder, Engager, Relationship Builder, Adapter

Your Core Financial Life Profile is "Engager".

Engagers enjoy new meeting people and using, new situations and new environments. They use their people skills to build business relationships and interact with an ever-widening circle of contacts. Engagers enjoy using their verbal skills and will be very outgoing. They approach situations enthusiastically, especially when they are passionate about the outcomes, and enjoy new opportunities and starting (rather than finishing) new projects.

When communicating with Strategists like Chris remember to:

- Recognize their need for control
- Give direct answers; get to the point
- Move quickly to the bottom line
- Offer options so they can decide
- Use summaries, bullets, and key points
- Anticipate their immediate responses and quick fixes
- Honor their need for structure, schedules, rules
- Look for ways to minimize the risks

The following are typical strengths for Strategists:

- Initiating, wants to set the agenda
- Places high priority on achieving goals
- Speaks directly
- Sees the strategic/future potential
- Operates well in conflict
- Works at a fast pace
- Analyzes before deciding
- Conducts research to determine facts

The following are typical struggles for Strategists:

- May be controlling and not know it
- Sometimes too impatient
- Underestimates work needed to achieve goals
- Perfectionistic to avoid mistakes

Your Core Financial Life Profile is "Strategist".

Strategists excel by blending their strong drive to reach goals with a desire for precision, accuracy, and quality. As a result, they are equipped to be strategic players in situations where achieving results is a priority. They have an ability to achieve ambitious goals and concentrate on matter-of-fact, practical issues. They also have a detached, impartial approach that enhances their ability to make difficult decisions.

When communicating with Engagers like Helen remember to:

- Recognize their need for fun and/or excitement
- Invest time in building the relationship
- Tell them who is involved
- Transfer talk to an action plan
- Allow for plenty of freedom
- Use graphics and verbal communications
- Expect/encourage their out-of-the-box thinking
- Resist the temptation to prematurely edit their ideas

The following are typical strengths for Engagers:

- Good at meeting and communicating with people
- Lighthearted and enthusiastic
- Good at promoting ideas and opportunities
- Likes to make a good impression
- Flexible and versatile
- Works with broad concepts
- Improvises and operates without procedures
- Instinctive, operates spontaneously

The following are typical struggles for Engagers:

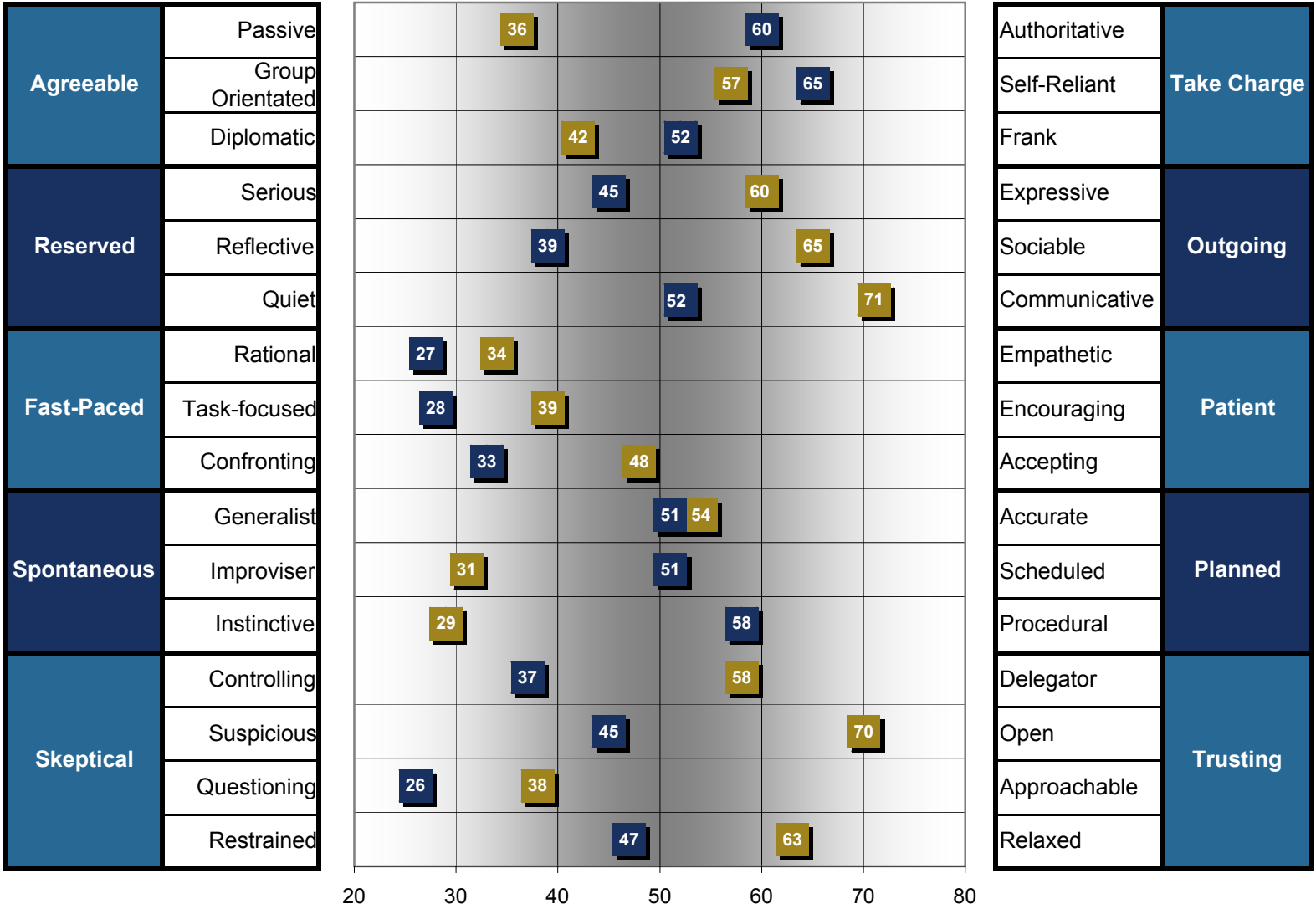
- Can be overly optimistic
- May display strong emotions
- May wing it too much
- Can be impulsive

Core Life Profile Sub-Factors Comparison Graph

Helen

Chris

Core Financial Life Drivers



Financial Life Planning Drivers

