



Financial DNA® Core Life Motivations Profile

Group Report for:
Sample

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

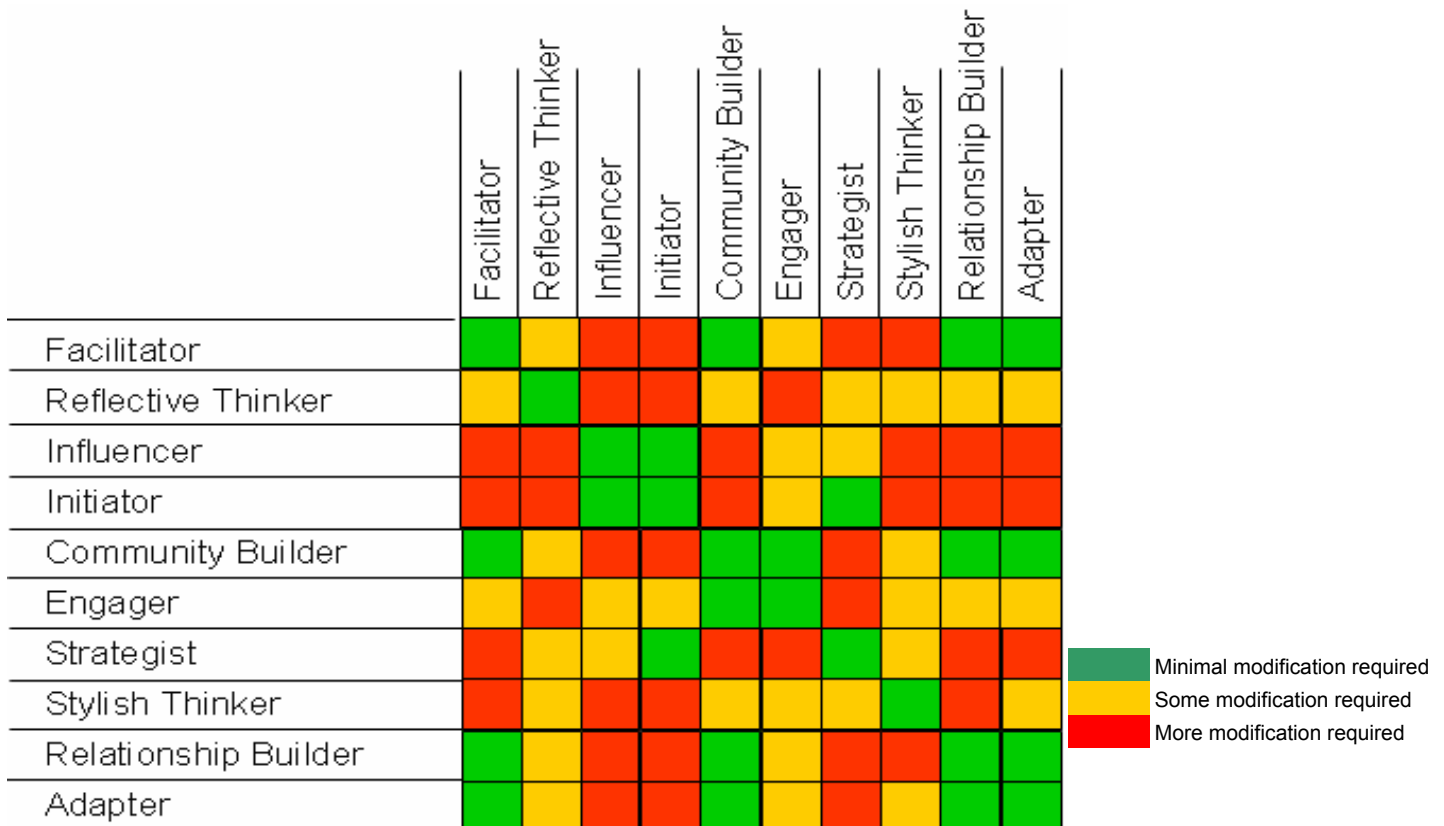
Date of Completion:
17-March-2010

Group Member	Core Financial Life Profile
Mitch Heath	Strategist
Sara Manning	Influencer
Joshua Newman	Engager
Tim Roger	Facilitator
Sally Smith	Reflective Thinker
Peter Roberts	Initiator

Group Compatibility Matrix

With commitment and mutual understanding, a strong long-term relationship can be built with others. Successful relationships can be developed from any combination of behavioral style.

The graph below shows those profiles that typically most easily work together because they are generally closer in relationship style. Also, it shows those Core Financial Life Profiles that have 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 in the group 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 attitudes is important for building a successful relationship.



Interpretation of this Report

The profile report reflects the natural behavior of your group. Natural behavior will generally remain consistent over time as it is the core of who your group members are. However, the report does not reflect how your group members may from time to time modify their behavior in certain situations based on experiences, education and values.

Shown below are individual scores for each behavioral factor in a range of 20 (left side) to 80 (right side).

To the extent your group members have strong profile factors over 60 and under 40, there is a higher chance the behavioral insights in this report will be more intensively displayed when they are making life and financial decisions over a period of time. Scores closer to 50 indicate a more moderate style that is typically more flexible in that behavioral factor.

Core Financial Life Drivers

The following 5 factors representing the Core Financial Life Drivers provide specific insights into a group member's natural talents, strengths and struggles. Overall, these factors will indicate their natural desire to build relationships and also their motivations to getting results. If group members have scores which are high on Take Charge, Fast-Paced, Planned and Skeptical they will be more results and tasks focused. If group members have scores which are high on Cooperative, Outgoing, Patient and Trusting they will be more relationship focused.

Factor 1: Commanding

20	Cooperative (Agreeable)	Mid-Range	Take Charge (Goal Orientated)	80
	Mitch Heath (50) Joshua Newman (50) Sally Smith (48)	Sara Manning (55) Tim Roger (51)	Peter Roberts (56)	

Factor 2: People

20	Reserved (Focused)	Mid-Range	Outgoing (People Connection)	80
	Mitch Heath (40) Sally Smith (43) Peter Roberts (40)	Tim Roger (50)	Sara Manning (69) Joshua Newman (60)	

Factor 3: Patience

20	Fast-Paced (Results Focused)	Mid-Range	Patient (Stability)	80
	Mitch Heath (41) Sara Manning (44) Joshua Newman (44) Peter Roberts (44)	Tim Roger (51)	Sally Smith (58)	

Core Financial Life Drivers (Continued)

Factor 4: Structure

20	Spontaneous (Not Prepared)	Mid-Range	Planned (Orderly)	80
	Sara Manning (28)	Mitch Heath (50)		
	Joshua Newman (31)	Tim Roger (46)		
		Peter Roberts (46)	Sally Smith (61)	

Factor 5: Trust

20	Skeptical (Doubting)	Mid-Range	Trusting (Believing)	80
		Mitch Heath (46)	Sara Manning (58)	
		Tim Roger (51)	Joshua Newman (56)	
		Sally Smith (48)	Peter Roberts (46)	

Financial Life Planning Drivers

The following 3 factors representing your group members Financial Life Planning Drivers are also core to how your group makes life and financial decisions. However, these factors focus more specifically on a group members' motivations for financial growth and/or balance in their life. If group members have scores high on Pioneer, Risk Taker and Creative then this will indicate desires to maximize, set goals, take opportunities, innovate and to expand their horizons. If they have scores high on Content, Cautious and Anchored then they will be more interested in work life balance and following tried and tested ways.

Factor 6: Pioneering

20	Content (Comfortable)	Mid-Range	Pioneer (Trailblazing)	80
		Sara Manning (48)	Mitch Heath (57)	
		Joshua Newman (50)	Tim Roger (55)	
		Peter Roberts (55)	Sally Smith (57)	

Factor 7: Risk

20	Cautious (Safety)	Mid-Range	Risk Taker (Risk)	80
		Sara Manning (55)	Mitch Heath (59)	
		Tim Roger (52)	Joshua Newman (60)	
	Sally Smith (39)	Peter Roberts (53)		

Factor 8: Creativity

20	Anchored (Practical)	Mid-Range	Creative (Ideas)	80
		Sara Manning (51)	Mitch Heath (59)	
	Tim Roger (43)	Joshua Newman (55)		
		Sally Smith (46)	Peter Roberts (64)	

Analysis of the Group

Shown below are the number and percentage of individuals in your group with Left (<45), Mid-Range (≥ 45 and ≤ 55) and Right (>55) scores for each Profile Factor.

Factor 1: Commanding

Number of Left
Cooperative
0% (0)

Number of Mid-Range
83% (5)

Number of Right
Take Charge
17% (1)

Factor 2: People

Number of Left
Reserved
50% (3)

Number of Mid-Range
17% (1)

Number of Right
Outgoing
33% (2)

Factor 3: Patience

Number of Left
Fast-Paced
67% (4)

Number of Mid-Range
17% (1)

Number of Right
Patient
17% (1)

Factor 4: Structured

Number of Left
Spontaneous
33% (2)

Number of Mid-Range
50% (3)

Number of Right
Planned
17% (1)

Factor 5: Natural Trust

Number of Left
Skeptical
0% (0)

Number of Mid-Range
67% (4)

Number of Right
Trusting
33% (2)

Factor 6: Pioneering

Number of Left
Content
0% (0)

Number of Mid-Range
67% (4)

Number of Right
Pioneer
33% (2)

Factor 7: Risk

Number of Left
Reserved
17% (1)

Number of Mid-Range
50% (3)

Number of Right
Risk Taker
33% (2)

Factor 8: Creativity

Number of Left
Anchored
17% (1)

Number of Mid-Range
50% (3)

Number of Right
Creative
33% (2)

Your Group's Overall Quality Life Behavioral Attitudes

Your group's overall natural motivations, desires and approach for building a Quality Life are reflective of the strongest traits in their combined natural behavioral style. Based on this group's two strongest behavioral factors which have been calculated by averaging each individual's factor scores, the primary Quality Life Behavioral Attitudes for this group are summarized in the table below.

	Core Life Attitude 1 Spontaneous	Core Life Attitude 2 Pioneering
Quality Life Outlook	Flexibility	Being progressive
Wealth Creation Philosophy	Flamboyant	Growth orientated
Money Attitude	Spend it	Driven
Financial Goal Setting	Needs clear boundaries	Ambitious
Activity Passion	Improvisation	Accepting challenges
Life Values	Freedom	Taking action
Planned Giving Motivation	Fun	Having high impact
Strength	Instinctive	Takes initiative
Blind-spot	Impulsive	Too focused
Communicate With Them By...	Provide broad facts	Provide big picture

Your Group's Overall Financial Planning Insights

Based on the group's scores for each behavioral factor, the group's financial planning insights are shown below. These insights are ordered showing the insights that are likely to be more intensively displayed first, and the more moderately displayed insights last. Some of these areas will be positive areas to be utilized in increasing productivity of the group, others could be "blind-spots" without awareness.

Financial Planning Insights	
Comfort with Change:	HIGH
Setting Goals:	MEDIUM
Sets the Agenda:	MEDIUM
Spender:	MEDIUM
Financially Organized:	MEDIUM
New Idea Driven:	MEDIUM
Need for Control:	MEDIUM
Need for Information:	MEDIUM
Relationships:	MEDIUM
Risk Tolerance:	MEDIUM
Risk Propensity:	MEDIUM
Pursuing Goals:	MEDIUM
Results:	MEDIUM

Subfactor Analysis: Core Financial Life Drivers

Factor 1: Commanding

	Take Charge/ Cooperative	L/M/R	Authoritative/ Consensus Seeking	L/M/R	Self-Reliant / Group Oriented	L/M/R	Frank / Diplomatic	L/M/R
Mitch Heath	50	mid	54	mid	48	mid	51	mid
Sara Manning	55	mid	59	right	50	mid	51	mid
Joshua Newman	50	mid	61	right	40	left	51	mid
Tim Roger	51	mid	55	mid	45	mid	51	mid
Sally Smith	48	mid	54	mid	50	mid	46	mid
Peter Roberts	56	right	64	right	50	mid	53	mid
AVERAGE	52	mid	58	right	47	mid	51	mid

- Left
- Mid-Range
- Right

Left: Cooperative Behavior

Strengths: Motivated to be practical, diplomatic

Struggles: Can be too hesitant, passive

Right: Take Charge Behavior

Strengths: Motivated to be visionary, decisive

Struggles: Can be too forceful, blunt

Factor 2: People

	Outgoing / Reserved	L/M/R	Expressive / Serious	L/M/R	Sociable / Reflective	L/M/R	Communicative/ Quiet	L/M/R
Mitch Heath	40	left	41	left	37	left	58	right
Sara Manning	69	right	60	right	62	right	30	left
Joshua Newman	60	right	60	right	50	mid	40	left
Tim Roger	50	mid	48	mid	46	mid	54	mid
Sally Smith	43	left	48	mid	45	mid	69	right
Peter Roberts	40	left	43	left	39	left	56	right
AVERAGE	50	mid	50	mid	47	mid	51	mid

- Left
- Mid-Range
- Right

Left: Reserved Behavior

Strengths: Motivated to be reflective, focused

Struggles: Can be too withdrawn, private

Right: Outgoing Behavior

Strengths: Motivated to be expressive, recognized

Struggles: Can be too talkative, emotional

Subfactor Analysis: Core Financial Life Drivers (Continued)

Factor 3: Patience

	Patience / Fast-Paced	L/M/R	Empathetic / Rational	L/M/R	Encouraging / Task-focused	L/M/R	Accepting / Confronting	L/M/R
Mitch Heath	41	left	40	left	45	mid	41	left
Sara Manning	44	left	41	left	49	mid	46	mid
Joshua Newman	44	left	41	left	49	mid	48	mid
Tim Roger	51	mid	46	mid	52	mid	54	mid
Sally Smith	58	right	52	mid	52	mid	59	right
Peter Roberts	44	left	43	left	52	mid	48	mid
AVERAGE	47	mid	44	left	50	mid	49	mid

- Left
- Mid-Range
- Right

Left: Fast-Paced Behavior

Strengths: Motivated to be logical, challenging

Struggles: Can be too impatient, critical

Right: Patient Behavior

Strengths: Motivated to be understanding, tolerant

Struggles: Can be too lenient, compromising

Factor 4: Structured

	Planned / Spontaneous	L/M/R	Accurate / Generalist	L/M/R	Scheduled / Improviser	L/M/R	Persistent / Instinctive	L/M/R
Mitch Heath	50	mid	50	mid	46	mid	58	right
Sara Manning	28	left	36	left	30	left	30	left
Joshua Newman	31	left	30	left	36	left	40	left
Tim Roger	46	mid	53	mid	40	left	54	mid
Sally Smith	61	right	53	mid	64	right	69	right
Peter Roberts	46	mid	48	mid	44	left	56	right
AVERAGE	44	left	45	mid	43	left	51	mid

- Left
- Mid-Range
- Right

Left: Spontaneous Behavior

Strengths: Motivated to be instinctive, flexible

Struggles: Can be too unfocused, impulsive

Right: Planned Behavior

Strengths: Motivated to be systematic, particular

Struggles: Can be too rigid, perfectionistic

Factor 5: Natural Trust

	Trusting / Skeptical	L/M/R	Delegator / Controlling	L/M/R	Open / Suspicious	L/M/R	Approachable/ Questioning	L/M/R	Relaxed / Exacting	L/M/R
Mitch Heath	46	mid	50	mid	40	left	41	left	50	mid
Sara Manning	58	right	45	mid	69	right	44	left	72	right
Joshua Newman	56	right	50	mid	60	right	44	left	69	right
Tim Roger	51	mid	49	mid	50	mid	51	mid	54	mid
Sally Smith	48	mid	52	mid	43	left	58	right	39	left
Peter Roberts	46	mid	44	left	40	left	44	left	54	mid
AVERAGE	51	mid	48	mid	50	mid	47	mid	56	right

- Left
- Mid-Range
- Right

Left: Skeptical Behavior

Strengths: Motivated to be questioning, guarded

Struggles: Can be too doubting, wary

Right: Trusting Behavior

Strengths: Motivated to be receptive, believing

Struggles: Can be too forgiving, naïve

Factor 6: Pioneering

	Pioneer / Content	L/M/R	Initiator / Steady	L/M/R	Competitive / Balanced	L/M/R	Determined / Flexible	L/M/R
Mitch Heath	57	right	54	mid	57	right	58	right
Sara Manning	48	mid	59	right	55	mid	30	left
Joshua Newman	50	mid	61	right	48	mid	40	left
Tim Roger	55	mid	55	mid	55	mid	54	mid
Sally Smith	57	right	54	mid	47	mid	69	right
Peter Roberts	55	mid	64	right	45	mid	56	right
AVERAGE	54	mid	58	right	51	mid	51	mid

- Left
- Mid-Range
- Right

Left: Content Behavior

Strengths: Motivated to be satisfied, balanced

Struggles: Can be too complacent, easygoing

Right: Pioneering Behavior

Strengths: Motivated to be goal oriented, ambitious

Struggles: Can be too driven, success focused

Factor 7: Risk

	Risk Taker / Reserved	L/M/R	Bold / Careful	L/M/R	Risk Tolerant/ Stability	L/M/R
Mitch Heath	59	right	58	right	59	right
Sara Manning	55	mid	54	mid	56	right
Joshua Newman	60	right	64	right	56	right
Tim Roger	52	mid	55	mid	49	mid
Sally Smith	39	left	36	left	42	left
Peter Roberts	53	mid	50	mid	56	right
AVERAGE	53	mid	53	mid	53	mid

- Left
- Mid-Range
- Right

Left: Cautious Behavior

Strengths: Motivated to be calculated, certain

Struggles: Can be too conservative, resistant to change

Right: Risk Taker Behavior

Strengths: Motivated to be daring, courageous

Struggles: Can be too carefree, overconfident

Factor 8: Creativity

	Creative / Anchored	L/M/R	Original/ Experience-Based	L/M/R	Enterprising / Practical	L/M/R	Right-Brained/ Left-Brained	L/M/R
Mitch Heath	59	right	54	mid	56	right	55	mid
Sara Manning	51	mid	39	left	50	mid	62	right
Joshua Newman	55	mid	51	mid	50	mid	62	right
Tim Roger	43	left	37	left	36	left	49	mid
Sally Smith	46	mid	40	left	43	left	43	left
Peter Roberts	64	right	54	mid	60	right	59	right
AVERAGE	53	mid	46	mid	49	mid	55	mid

- Left
- Mid-Range
- Right

Left: Anchored Behavior

Strengths: Motivated to be consistent, experience driven

Struggles: Can be too reliant on proof, tied to old ways

Right: Creative Behavior

Strengths: Motivated to be original, imaginative

Struggles: Can be too easily bored, abstract

Disclaimer

The purpose of this Group Report is educational. It is designed to help group members identify their natural behavioral strengths. The Financial DNA Core Life Motivations Profile and this Group Report should not be used to identify, diagnose, or treat psychological, mental health, and/or medical problems. Additionally, if used to evaluate personnel, the user should seek adequate legal counsel to ensure compliance with applicable local, state, and federal employment laws. The user assumes sole responsibility for any actions or decisions that are made as a result of using his aid to self-discovery. By using the Financial DNA Core Life Motivations Profile and this Group Report you expressly waive and relinquish any and all claims of any nature against Financial DNA Resources, any affiliated companies, and/or their employees arising out of or in connection with the use of this survey.

Additional Reports

- If you would like to learn more about your financial decision-making behavior, please review your Financial Planning and Wealth Mentoring Reports.
- For more information, please email us at inquiries@financialdna.com.

Next Steps

1. Financial Directions Profile

This profile is stage 2 of the Financial DNA Discovery Process and uncovers your learned financial behavior and decision-making preferences, based on your upbringing, education and environment.

A key outcome of this stage of the process is the Financial DNA Behavior Analysis, which compares your natural behavior (i.e. from the Financial DNA Core Life Motivations profile) with your learned financial behavior, and this provides a more robust platform to establish your financial plan.

2. Quality Life Insights Profile

This profile is stage 3 of the Financial DNA Discovery Process and uncovers a number of your quality life drivers which in addition to your financial behaviors are foundational to your life purpose and setting your goals. The key areas uncovered are passion, vision, values, needs and wants and the environment in which you are in now and from which you have come.

3. Further Education

We have a number of education programs available for investors and financial advisors to enhance their understanding of what the profiles mean and how to use them on a daily basis. Please contact us at inquiries@financialdna.com for more information and access to these programs.