



Are you interested in discovering the strengths and blind-spots which influence your personal and financial performance?

Do you have the confidence to choose between the many options in your life?

Do you have a road map for the next stage of your life journey?

Discover Your Financial DNA for Building Financial Planning Performance™

Thank you for your interest in Financial DNA. Our goal is to “know, engage and grow” you by providing a customized lifelong financial planning experience based on who you are.

Financial DNA is a validated financial personality discovery system that is used to objectively reveal your unique behaviors and preferences for more confidently making the right life and financial decisions. Our philosophy is that your life and financial choices are completely integrated and directly impact each other. Ultimately, sustainable performance is driven by knowing and managing your behavior.

Did you know that independent research shows 95% of wealth is created from your behavior and 5% from your investments? By spending just 1 hour of time completing the online Financial DNA Discovery Process you can gain valuable insights and strategies on those strengths and struggles that are influencing your life and financial decisions.

The Three Financial DNA Discovery Processes for You to Complete:

1. **Communication DNA Discovery:** The Communication DNA Discovery uncovers your natural preferences for how you wish to be communicated with by others. This process will take 2 minutes for you to complete.

The report will provide powerful insights about your unique communication style for building deeper Relationship Performance with your partner, family and advisor.

2. **Quality Life Discovery:** The Quality Life Discovery Process uncovers Quality Life drivers across 8 key areas including, life purpose, career, finances, health and recreation, community, relationships, confidence and wisdom. This process will take 20 to 30 minutes for you to complete.

The DNA Quality Life Performance Report will provide measurement of how you are tracking in living a Quality Life across these 8 key areas, and then provide applied natural DNA behavior insights for improving your Quality Life balance. This process will substantially enhance the meaning and usability of our offering in helping you to set your goals and Live with Meaning™.

A key part of this process is also completing your Financial DNA Natural Behavior Discovery. The Financial Natural Behavior report will provide insights into your natural “hard-wired” behavior as it influences your inherent life and financial motivations, and hence your relationship to money.

3. **Financial Personality Discovery:** The Financial Personality Process seeks to uncover your risk tolerance and all of your financial behaviors and preferences in the current circumstances delving deeper into your life experiences, values and education in financial decision-making. This process will take 20 to 30 minutes to complete.

The DNA Financial Performance Report provides an in-depth analysis of your complete Financial DNA, identifying how your financial personality will influence the financial and investment decisions that you make. The final outcome will be the preparation of a Behavioral Investment Policy Statement which will become your guide for making key financial and investment decisions and not reacting in the “spur of the moment” to market changes.

We are ready to be your partner in transforming your financial planning experience. The Financial DNA Discovery journey is fun and will be the start of getting on a new path for realizing your life and financial potential.

For More Information

Visit our website at: www.financialdna.com

Phone: (770) 274-0311

Email: inquiries@financialdna.com

Three Discovery Steps to Customizing Life Long Financial Planning Experiences

