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# Quality Life Insights Profile

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**CONFIDENTIAL**

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SAMPLE Name

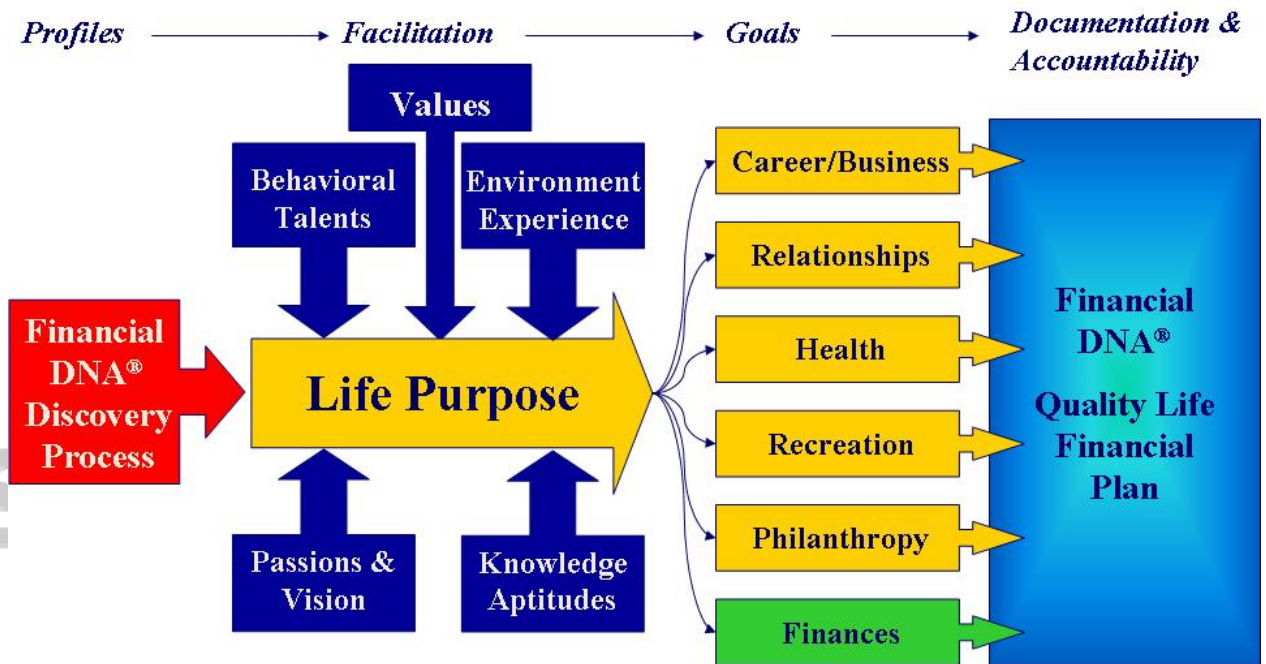
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Date

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# 1. Introduction to the Quality Life Insights Profile

The “Quality Life Insights Profile” is the third stage in the series of profiles that constitute the Financial DNA® Discovery Process. It will lead you to greater self awareness and discovery about what motivates your life and financial choices in a number of key areas.

The power of this profile is increased if there is a facilitation process in order to discover your life purpose and to set clear and achievable goals. Therefore, we encourage you to discuss the results with your Wealth Mentor. The outcome will be much greater life and financial clarity in building your “Quality Life Financial Plan.”



The Quality Life Insights Profile is made up of the following stand-alone sections. Each can be completed at once or at different times:

- Section 1: Current Environment
- Section 2: Past Experiences
- Section 3: Passion
- Section 4: Vision
- Section 5: Life Foundations
- Section 6: Financial Needs and Wants

## 2. Guidelines

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As you work through each section of the Quality Life Insights Profile, we recognize there may be some questions you may not wish to complete at this time. Please do not feel compelled, as this is your choice. We recognize that over time you may find it easier to answer these questions in more depth.

- Each section should be completed in quiet surroundings without interruptions and noise.
- Further, each section can be completed at separate times.
- Relax and read the questions carefully before you start.
- There are no right or wrong answers.
- As you complete the Profile, you will be faced with a 'choice' style response or a narrative. If you need to expand on any of your responses, please do so on an additional sheet of paper or Word document.
- Be instinctive with your answers and do not deliberate on them - your first choice is usually the best.
- Do not be surprised to find that when completing this Profile you experience frustration or difficulty. You may, for the first time, be opening/imagining a whole new world in terms of your wealth creation.
- Have fun and remember THIS PROFILE IS NOT A TEST, instead it paints a word picture of your Financial DNA. It is not good or bad, it is simply you.
- **After you have completed the profile please discuss the results with your Wealth Mentor.**

## 3. Timing

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You need to allow about 15 to 20 minutes to complete each section of this Profile.



# Current Environment

*Are you currently living the life you want?*

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## Where is Your Life Currently?

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### Question 1

By answering the following, a glimpse of your current environment can be obtained.

1.	How many children do you have?	
2.	How many brothers and sisters do you have?	
3.	Does your spouse work? (Yes/No)	
4.	Are your children currently in College? (Yes/No)	
5.	Do you own your own home? (Yes/No)	
6.	Do you and your spouse make joint decisions in terms of investments? (Yes/No)	
7.	Do you have a vacation home? (Yes/No)	
8.	Do you belong to a country club? (Yes/No)	
9.	Do you belong to any other clubs for health and/or recreation? (Yes/No)	
10.	How many times a year do you travel internationally on business?	
11.	How many times a year do you travel domestically on business?	
12.	How many vacations do you take per year?	
13.	How many of your vacations are to another country?	
14.	How many cars do you own?	
15.	Do you currently use a financial advisor or other guide? (Yes/No)	

## Your Education

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### Question 2

Please indicate the following.

	Yes / No	Year Completed	Institution	Stream/Degree/Major etc
High School				
TAFE / College				
University - Undergraduate				
Postgraduate Studies				
Other Studies (e.g. Securities Courses)				

## Your Ideal Life

### Question 3

Listed below are a number of activities. Indicate the degree to which you currently pursue them.

	1 = Not at all 2 = To a small extent 3 = To some extent 4 = To a great extent 5= To an extraordinary extent	Currently Pursue 1-5 ↓
1	Going to the theatre	
2	Viewing art galleries	
3	Owning a wine collection	
4	Sailing or skiing	
5	Driving luxury cars	
6	Being a high risk investor	
7	Going to classical concerts or the opera	
8	Becoming a philanthropist	
9	Being on the committee of a prominent charity or benevolent society	
10	Playing golf or tennis regularly	
11	Attending church	
12	Collecting art	
13	Exercising regularly	
14	Gaining further education in an area of interest	
15	Maintaining a large home	
16	Taking adventurous vacations	
17	Eating in fine restaurants	
18	Wearing designer clothes	
19	Educating your children at private schools	
20	Other (Please Specify):	

### Question 4

In seeking to balance your business and personal life – indicate below where you are currently. Tick one box:

	Work/Personal						
	100/0	75/25	60/40	50/50	40/60	25/75	0/100
Currently							

## Summary

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**Environment (n).** The circumstances or conditions that surround one; surroundings; atmosphere; condition; climate.

**“You are a product of your environment. So choose the environment that will best develop you toward your objective. Analyze your life in terms of its environment. Are the things around you helping you toward success...or are they holding you back?” - W. Clement Stone**

1. In considering all your responses regarding your current environment, which five aspects MOST affect your current financial life? Please rank them in priority order. (No.1 being the most significant)

- 1.
- 2.
- 3.
- 4.
- 5.

2. Having considered your current situation, what are 5 aspects of your ideal personal and financial environment for the future? Please rank these in priority order. (No 1 being the most significant.)

- 1.
- 2.
- 3.
- 4.
- 5.



## Past Experiences

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*How have your experiences  
shaped your decision-making?*

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SAMPLE

SAMPLE

## Life Experiences

### Question 1

To what degree did the following events or situations have an impact on your life?

	1 = Not at all 2 = To a small extent 3 = To some extent 4 = To a great extent 5= To an extraordinary extent	Enter 1 – 5 Here ↓
1	School	
2	College education	
3	Business travel	
4	Overseas work	
5	Meeting your business partner	
6	Meeting your spouse / significant other	
7	Having children	
8	Making successful investments	
9	Having a life threatening event	
10	Losing a significant amount of money	
11	Other (specify):	

### Question 2

Which of the following tragic life changing events in your upbringing have you experienced? And to what extent have they influenced your financial mindset?

	1 = Not at all 2 = To a small extent 3 = To some extent 4 = To a great extent 5= To an extraordinary extent	Please check all that apply	To what extent do you believe these events have influenced your current financial mindset or environment? Enter 1-5 Here ↓
1	Death of a parent		
2	Divorce of parents		
3	Bankruptcy of parents		
4	Breakdown of family business partnership		
5	Death of a sibling		
6	Personal serious health scare		
7	Serious health scare of a close family member		
8	Other: _____		

### Question 3

To what degree do the following circumstances describe your upbringing? How strongly has each circumstance affected your financial decision making?

	<p>1 = Not at all 2 = To a small extent 3 = To some extent 4 = To a great extent 5 = To an extraordinary extent</p>	<p>To what degree do these circumstances describe your upbringing? Enter 1-5 Here ↓</p>	<p>To what degree have these factors affected your financial decision making? Enter 1-5 Here ↓</p>
1	Family from rags to riches		
2	Parent(s) always away on business		
3	Family from riches to rags		
4	Very well established wealth		
5	Very strict domineering parental control		
6	Thrifty parents who educated me to save		
7	Never enough money for the essentials – felt denied		
8	Middle class, no obvious problems		
9	Given many opportunities – traveling, sport etc.		
10	Your family was poorer than your relatives or your friends' families		
11	Your family was wealthier than your relatives or your friends' families		
12	Unhappy family life		

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## Influences

### Question 4

Please indicate the level of importance (in the past) of the following persons or groups in shaping your attitude on financial matters:

	1 = Not at all 2 = To a small extent 3 = To some extent 4 = To a great extent 5= To an extraordinary extent	Enter 1 – 5 Here ↓
1	School or college	
2	Mother	
3	Father	
4	Grandparents	
5	Sibling	
6	Friends	
7	Employer	
8	Social or Sporting Club	
9	Spouse	
10	Financial Advisor	
11	Spiritual Leader	
12	Religious Community	
13	Reading books	
14	Other (please specify)	

### Question 5

How relevant are the following circumstances and attitudes in shaping your financial mindset?

	1 = Not at all 2 = To a small extent 3 = To some extent 4 = To a great extent 5= To an extraordinary extent	Enter 1 – 5 Here ↓
1	Always had someone to manage your money for you	
2	Encouraged to make all decisions yourself	
3	Having had a teacher to guide you	
4	Required to take no financial responsibility	
5	Content to receive the dividend checks but not worried about how it comes	
6	Taught financial well being is a necessity of life	
7	Learning that making substantial wealth is a symbol of success	
8	Learning the joy of giving some of your allowance to charity or church	
9	Learning that saving money today provides financial freedom for tomorrow	
10	Learning to live life today in case there is no tomorrow	

### Your Life Path

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#### Question 6

List 3 positive life-changing experiences or circumstances, up to the age of 18, which impacted the path you took to get you to where you are now. (If you do not have enough space please attach a separate document.)

Positive Experience no.1 \_\_\_\_\_

How did you feel about this at that time?  
\_\_\_\_\_

Positive Experience no.2 \_\_\_\_\_

How did you feel about this at that time?  
\_\_\_\_\_

Positive Experience no.3 \_\_\_\_\_

How did you feel about this at that time?  
\_\_\_\_\_



**Question 7**

List 3 negative life-changing experiences or circumstances, up to the age of 18, which impacted the path you took to get you to where you are now. (If you do not have enough space please attach a separate document.)

Negative Experience no.1

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How did you feel about this at that time?

---

Negative Experience no.2

---

How did you feel about this at that time?

---

Negative Experience no.3

---

How did you feel about this at that time?

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## Summary

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### **Experience (n).**

1. a particular instance of personally encountering or undergoing something
2. the process or fact of personally observing, encountering, or undergoing something:  
*business experience*
3. the observing, encountering, or undergoing of things generally as they occur in the course of time: *to learn from experience; the range of human experience*

Source: [www.dictionary.com](http://www.dictionary.com)

In considering all of your responses regarding your life to date, what are the 5 most significant experiences or influences which have affected your current financial life or attitudes? List them in priority order. (No.1 being the most significant)

<b>Most Significant Life Experiences or Influences:</b>
1.
2.
3.
4.
5.

<b>What <u>impact</u> have the above experiences and influences had on your current financial life and / or attitudes?</b>
1.
2.
3.
4.
5.



Passion

SAMPLE

*What are you passionate about?*

SAMPLE

SAMPLE

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## Interest Areas

To what extent do the following make you:

Lose track of time? Feel energized? Feel enthusiastic for long periods? Come up with great ideas? Want to know more?

1 = Not at all 2 = To a small extent 3 = To some extent 4 = To a great extent 5= To an amazing extent		Lose track of time	Feel energized	Feel enthusiastic for long periods	Come up with great ideas	Want to know more	Total Score
		Enter 1-5 Here ↓					
1	Children, families or relationships						
2	Real estate, property development or architecture						
3	Science, technology and innovation						
4	Philosophy						
5	Art, music or literature						
6	Law or Accounting						
7	Politics						
8	People, cultures and societies						
9	Religion or spirituality						
10	The stock market						
11	Animals or the environment						
12	Health						
13	Education and learning						
14	Business and economics						
15	Media or entertainment						
16	Psychology or psychiatry						
17	Fashion						
18	Antiques or collectibles						
19	Entertaining, lifestyle or leisure activities						
20	Sport participation						
21	Other (specify):						

## Actions You Enjoy

To what extent are you passionate about pursuing each of the following activities?

1 = Not at all   2 = To a small extent   3 = To some extent 4 = To a great extent   5= To an amazing extent		Enter 1 – 5 Here ↓
1	Helping others	
2	Building Things	
3	Mastering a technical field	
4	Taking risks	
5	Making people's lives better	
6	Planning or organizing	
7	Fixing or working with machines	
8	Investigating	
9	Meeting influential people	
10	Solving problems	
11	Exposing immoral behavior or activities	
12	Working with animals or nature	
13	Traveling domestically / interstate or internationally	
14	Working with numbers	
15	Being creative	
16	Researching information	
17	Having contact with or working in the media	
18	Communicating in writing	
19	Speaking to large groups of people	
20	Coming up with new ideas	
21	Educating others	
22	Experiencing different cultures	
23	Executing projects	
24	Sports	
25	Other (specify):	

## Summary

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**Passion** *n.* something that is desired intensely; object of infatuation or enthusiasm

**Passion = Interest Areas + Actions You Enjoy**

1. People can have multiple passions. Using the preceding exercises and looking at your top scores, what would you say are **your top 3...**

Interest Areas	Actions You Enjoy
1.	1.
2.	2.
3.	3.

2. Reflect on 3 activities or things you could do to build a life using your passions.

- a)
- b)
- c)



# Vision

*Where do you see yourself heading?*

SAMPLE

SAMPLE

SAMPLE

## Your Desired Future

Through the following questions consider the broad practical boundaries for your life.

### Question 1

Which of the following options would you choose today?

		Tick One Below ↓
1	Keep on doing what I already do well, but change the environment	
2	Change the work I do but stay in the same environment	
3	Change my career completely	
4	Change nothing in my life	

### Question 2

How many hours per week do you see yourself working? (Please check one for each time frame.)

		currently	In 1 year	In 5 years	In 10 years
1	10-20 hours				
2	20-30 hours				
3	30-40 hours				
4	40-50 hours				
5	More				

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### Question 3

In considering your finances, how much capital is enough? (Tick one below)

1	\$500,000 - \$2,000,000	
2	\$2,000,000 - \$5,000,000	
3	\$5,000,000 - \$10,000,000	
4	\$10,000,000 - \$25,000,000	
5	More than \$25,000,000	

### Question 4

Please indicate your plans for retirement.

In how many years do you intend to retire? 1 = 0-2 years    2 = 2-5 years    3 = 5-10 years    4 = 10-20 years    5 = never	
What net (after tax) disposable income in today's dollars will you want in retirement to maintain your lifestyle?	\$ yearly
What amount of capital do you want at retirement to maintain your lifestyle?	\$
Please answer the following questions using the following scale: 1 = Not at all    2 = To a small extent    3 = To a moderate extent 4 = To a great extent    5 = To a very great extent	Enter 1-5 Here ↓
How important is it for you to achieve these goals?	
Are you prepared to retire later to achieve these financial goals?	
Are you prepared to make sacrifices to achieve these goals?	

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## Life Dreams

Through the following questions identify at a broad level the possibilities of what your ideal life to look like.

### Question 5

To what extent are the following activities ones you want for your life?

1 = Do not agree 2 = Agree to a small extent 3 = Agree to some extent 4 = Agree to a great extent 5= Agree to an extraordinary extent	Enter 1-5 Here ↓
1. Being married	
2. Having children	
3. Being an excellent parent	
4. Traveling on at least one international vacation per year	
5. Traveling on at least one domestic vacation per year	
6. Having a vacation home	
7. Writing your life story	
8. Writing a best seller	
9. Owning your own business	
10. Taking your business international	
11. Living in an international location	
12. Winning a prestigious award for an invention	
13. Being number one in your field	
14. Being a sought after public speaker	
15. Being a recognized business leader	
16. Influencing people internationally	
17. Writing a screen play	
18. Starting your own non-profit	
19. Having a strong network of friends	
20. Playing sports	
21. Being a fashion designer	
22. Being a successful actor	
23. Volunteering extensively with non-profits	
24. Being a successful musician	
25. Going back to school for further education	
26. Moving to a large city	
27. Moving to the country	
28. Going into a helping profession or ministry	
29. Teaching people	
30. Other (specify):	

### Question 6

Assume you have vast personal wealth. What are up to 10 ways you would use this wealth?

1.	6.
2.	7.
3.	8.
4.	9.
5.	10.

### Question 7

What does "having it all" mean to you?

	1 = Do not agree 2 = Agree to a small extent 3 = Agree to some extent 4 = Agree to a great extent 5= Agree to an extraordinary extent	Enter 1-5 Here ↓
1	Have the basics of life and no real worries	
2	Working in a successful business I am passionate about	
3	Having enough money so I don't have to work	
4	Being healthy	
5	Being a successful entrepreneur	
6	Being able to give back to the community	
7	Having many friends who trust me	
8	Having unconditional love and support from my family	
9	Clarity about the decisions in my life	
10	Opportunity to travel extensively	
11	The ability to work in 2 or more vocations	
12	Having the time to do what is important to me	
13	To have recognition and status in the community	
14	To feel that I am valued	
15	To be able to give my children all the opportunities that I didn't have	
16	To be generous with my time, talents and money	
17	To invest myself in the lives of others	
18	Other: (specify)	

## Summary

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**Vision** *n.* something that is or has been seen; a mental image produced by the imagination; idea; concept; anticipation

### **Vision = Your Desired Future + Life Dreams**

1. In capturing your vision for the future, what would you like your life to look like in the next 1, 5, and 10 years? Using the preceding exercises and looking at your top scores, what would you say are your top 3...

Desires for the Future	Life Dreams
1.	1.
2.	2.
3.	3.

2. Reflect on 3 specific changes you need to make to your life so that you are able to move towards your vision.

(1)

(2)

(3)



# Life Foundations

*What are the important foundations for your life?*

SAMPLE

SAMPLE

SAMPLE

## Your Life Focus

### Question 1

Listed below are different motivations for how you live your life. Indicate how important each one is to you:

	1=Not at all Important 2=Not Important 3=Important 4=Very Important 5=Extremely Important	Enter 1 – 5 Here ↓
1	Reliability	
2	Appearance	
3	Achievements	
4	Altruism	
5	Honesty	
6	Relationships	
7	Health	
8	Privacy	
9	Personal growth	
10	Loyalty	
11	Risk Taking	
12	Security	
13	Aesthetics	
14	Respecting Authority	
15	Creativity	
16	Competition	
17	Freedom	
18	Independence	
19	Integrity	
20	Leisure	
21	Meaningful work	
22	Order	
23	Pleasure	
24	Service	
25	Other (please specify):	

# Your Life Legacy

## Question 2

What do you want to be remembered for?

	1=Not at all Important 2=Not Important 3=Important 4=Very Important 5=Extremely Important	Enter 1-5 Here ↓
1	As someone who got results	
2	As someone who made a difference	
3	As someone that everyone liked	
4	As someone who was adventurous	
5	As someone who was kind	
6	As someone who was successful	
7	As someone who was very wealthy	
8	As someone who loved people	
9	As being a great parent	
10	As being a great spouse	
11	As being the best in my field	
12	As someone who was great fun to be with	
13	As someone who found their passion and did it	
14	As someone who was always striving to learn	
15	As someone who was very wise	
16	As being the most innovative in their group	
17	As being a great friend	
18	Other (please specify):	

SAMPLE

## Summary

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**Life Foundations** include the values, principles, standards, or qualities considered fundamental, worthwhile, important or desirable to live a life of worth, importance, merit and eminence.

**Life Foundations = Life Focus and/or Life Legacy**

1. Using the responses in questions 1 and 2 above, identify 5 of your core life foundations.
2. Rate from 1 to 10, to what extent you currently have these life foundations in your life. (Note: 10 is highest.)

1. Your Life Foundations	2. Ratings (from 1 – 10)
1.	
2.	
3.	
4.	
5.	

3. Having completed the exercises above, what are 3 ways your future financial decisions will reflect your life values?

(1)

(2)

(3)



# Financial Needs and Wants

*What does a quality life include  
for you?*

SAMPLE

SAMPLE

SAMPLE

## Financial Needs and Wants

To assist you in prioritizing goals, identify whether the statements below are a financial need **or** want, and then indicate the level of importance you **currently** place on each item. Then indicate your current level of satisfaction with your accomplishment of each item.

1=Not applicable 2=Not Important 3=Important 4=Very Important 5=Extremely Important		Indicate Need (N) or Want (W) ↓	Importance 1-5 Here ↓	Satisfaction 1-5 Here ↓
<b>CAREER / BUSINESS</b>				
1	Increase my salary and wages income			
2	Set up my own business			
3	Expand my business operation			
4	Reduce my time at work			
5	Set up a succession plan for my family businesses			
6	To be trained for a second career			
7	Set up a business based on my interests or hobbies			
8	Other (Specify):			
<b>RETIREMENT</b>				
9	Retire before 60 years old			
10	Earn my current income in retirement			
11	Have financial freedom in retirement			
12	Other (Specify):			
<b>RECREATION / LIFESTYLE</b>				
13	Join a fitness center			
14	Develop a health conscious lifestyle			
15	Enroll in continuing education classes			
16	Pursue leisure activities / interests			
17	Entertain regularly			
18	Dress in the latest fashion			
19	Vacation / travel regularly			
20	Vacation without budgetary constraints			
21	Other (Specify):			
<b>WEALTH ACCUMULATION</b>				
22	Buy whatever I want without concern.			
23	Increase my current wealth by 50%			
24	Double my current wealth			

1=Not applicable 2=Not Important 3=Important  
4=Very Important 5=Extremely Important

Indicate Need  
(N) or Want (W)  
↓

Importance  
1-5 Here  
↓

Satisfaction  
1-5 Here  
↓

WEALTH ACCUMULATION

25 Triple my current wealth

26 Increase my current wealth five fold

27 Increase my current wealth ten fold

28 Other (Specify):

ASSETS – PERSONAL USE

29 Purchase a home

30 Refurbish a home

31 Furnish a home

32 Re-finance my properties

33 Purchase a vacation home

34 Purchase rural property

35 Collect art

36 Own jewelry

37 Collect antiques

38 Buy a luxury car

39 Enroll in continuing education classes

40 Other (Specify):

RELATIONSHIP / FAMILY COMMITMENTS

41 Increase time with family and/or friends

42 Pay for my spouse's (or my) school or higher education

43 Provide for our family so that only one income is needed

44 Provide funds for my children or grand children during my lifetime - e.g. help them with education, help them buy a home, etc ...

45 Provide funds for the care of my parents

46 Provide funds for my children's wedding

47 Other (Specify):

ESTATE PLANNING

48 Prepare a will

49 Leave some funds to the family



1=Not applicable 2=Not Important 3=Important  
4=Very Important 5=Extremely Important

Indicate Need  
(N) or Want (W)  
↓

Importance  
1-5 Here  
↓

Satisfaction  
1-5 Here  
↓

ESTATE PLANNING

- 50 Leave substantial funds to the family
- 51 Leave funds to community groups, religious institutions, and charities
- 52 Spend most of my wealth during my lifetime
- 53 Protect against taxes on distribution of estate
- 54 Appoint a power of attorney
- 55 Other (Specify):

INVESTMENT RETURNS

- 56 Invest existing capital for income
- 57 Invest existing capital for capital growth
- 58 Attain an average investment return of inflation + 2% per year
- 59 Attain an average investment return of inflation + 5% per year
- 60 Attain an average investment return of inflation + 7% per year
- 61 Attain an average investment return of inflation + 10% per year
- 62 Attain an average investment return of inflation + 15% per year
- 63 Use borrowings to increase my investment exposure
- 64 Other (Specify):

INSURANCE

- 65 Protect my family against financial consequences of death
- 66 Protect my earnings against disability
- 67 Protect my lifestyle against illness
- 68 Protect my business against loss of key employees
- 69 Provide medical insurance
- 70 Other (Specify):

PHILANTHROPY / GIVING

- 71 Volunteer time to a foundation, charity or religious cause
- 72 Work for a foundation, charity or religious cause
- 73 Give 10% or more of my income to a foundation, charity or religious cause
- 74 Give less than 10% of my income to a foundation, charity or religious cause
- 75 Increase my giving to foundations, charities or religious causes
- 76 Other (Specify):

## Summary

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**Need (n).** *Necessity; obligation; prerequisite; claim; requirement*

**Want (n).** *Something desired; craving; wish; something coveted*

1. Now circle and reflect on all those Needs and Wants items above marked with a "5", **and** which also have an accomplishment satisfaction score of 1 or 2.

2. Based on the choices in Question 1 above, identify up to 5 primary needs and up to 5 primary wants in building a Quality Life over the next 20 years which you want assistance in achieving? (Be prepared to discuss these with your Wealth Mentor.)

Needs:

- 1.
- 2.
- 3.
- 4.
- 5.

Wants:

- 1.
- 2.
- 3.
- 4.
- 5.

3. What can you imagine to be the financial implications of taking the necessary steps to achieve these Needs and Wants?

## Acknowledgement

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Please read the following notes and sign where indicated in the space below. This will acknowledge to your Authorized Financial DNA Resources Representative (and all related entities hereinafter referred to as "Financial DNA Resources"), that you have read and understood the following.

## Disclaimer

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The Financial DNA® Discovery Process has been developed with the express purpose of collecting information from you. This information may provide assistance to you, your financial or professional advisor, mentor or coach, and other persons with whom you interact. The entire "Quality Life Insights Profile" is to be regarded as feedback only.

Financial DNA Resources has NOT provided you with investment or securities advice on any matter that may impact your future financial decisions. Also Financial DNA Resources has NOT provided you with any advice that may impact your general decision making. All actions taken are solely your responsibility.

Should you require investment or securities advice of any nature, please directly contact your financial advisor.

## Privacy

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Financial DNA Resources will treat all information provided as strictly confidential.

Financial DNA Resources will only use the information you provided for the expressed purpose of uncovering your Financial DNA (that is your unique financial personality). Financial DNA Resources has strict internal policies and procedures for maintaining the confidentiality of your information.

If your advisor, coach or another person was involved in setting up your "Quality Life Insights Profile", Financial DNA will share the results with him or her unless you clearly indicate in writing we should NOT do so.

## No Distribution

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The "Quality Life Insights Profile" is not to be copied, reproduced, replicated or used in any way by a person not authorized in writing by Financial DNA Resources.

## Signature

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I have read and agree with the above information.

Signature:  
Print full name:

Date: