

# DNA Quality Life Performance Curriculum

Making the Right Choices for a Quality Life



	Module	Topic	Curriculum
Getting Engaged With Quality Life Performance	1	Communication Preferences	Pre-Work: Complete the Communication DNA Profile Objective: Become More Engaged in Your Quality Life Performance Planning Exercise: Confirm Your Communication Preferences Activity: Review Your Communication DNA Report Outcome: Increased Understanding of How You Wish To Be Communicated With
	2	Your Quality Life Pulse Check	Pre-Work: Complete the Quality Life Review Exercise Objective: Review Where Your Life Is at Now Exercise: The Quality Life Review Activity: Identify Strengths and Struggles of Your Current Life and Priorities Outcome: Focus on Future Quality Life Performance Areas
Pillar 1: Personal Performance	3	Natural Behavior Discovery	Pre-Work: Complete the Financial DNA Core Life Profile Objective: Identify Your Natural Behaviors for Financial Decision-Making Exercise: Connect Your Natural Behavior to a Quality Life and Financial Planning Activity: Review Your Core Life Financial Planning Report Outcome: Insights Into How Natural Behavior Influences Your Financial Behavior
	4	Enhanced Personal Awareness	Pre-Work: Review Your Core Life Wealth Mentoring Report Objective: Obtain Greater Awareness of Your Strengths and Struggles Exercise: Strengths and Struggles Review Activity: Identify Your Strengths and Struggles from the Strongest Profile Factor Outcome: Enhanced Personal Awareness
	5	Financial Preferences Discovery	Pre-Work: Complete Your Financial Directions Profile Objective: Assess Your Agreement With the Financial Directions Profile Exercise: Understanding Your Financial Preferences Exercise: Understanding Your Financial Behavior Analysis Activity: Review Your Financial Behavior Analysis Report Outcome: Understand Your Complete Financial Personality – Your Financial DNA
	6	Financial Success Strengths Review	Pre-Work: Review Your Core Life and Financial Directions Reports Objective: Greater Awareness of Your Financial Strengths and Struggles Exercise: Financial Success Strengths Review Activity: Identify 5 Factors Contributing To Past Financial Success and Failures Outcome: Increased Focus on Your Future Decision-Making Style
	7	Past Experiences Discovery (Optional)	Pre-Work: Complete the Quality Life Insights Profile – Past Experiences Objective: Identify How Your Life Journey Influences Your Financial Decisions Exercise: Life Lines Review Activity: Identify the Impact of Your Life High and Low Points On Decisions Outcome: Greater Awareness of How Your Life Journey Has Shaped You
Pillar 2: Relationship Performance	8	Connecting With Your Family (Optional)	Pre-Work: Organize Your Family to Complete their Financial DNA Profiles Objective: Identify the Strengths and Struggles of each Family Member Exercise: Connecting With Your Family Exercise Activity: Review Financial DNA Profiles of each Family Member Outcome: Enhanced Relationships With Family Members
	9	Building a Relationship With Your Wealth Mentor	Pre-Work: Review a Core Life Comparison Report of Your Wealth Mentor Objective: Learn How to Interact With Your Wealth Mentor Exercise: Building a Relationship With Your Wealth Mentor Activity: Review Core Life Comparison Report to Compare Strengths & Struggles Outcome: Enhanced Relationship With Your Wealth Mentor
Pillar 3: Goal Setting Performance	10	Identify Your Talents	Pre-Work: Review Your Talents from the Wealth Mentoring Report Objective: Identify Those Talents Which Will Maximize Your Life Exercise: Prepare Your Talents Statement Activity: Describe Your Talent from Each of the 8 Profile Factors Outcome: Talents Statement
	11	Identify Your Passion	Pre-Work: Complete the Quality Life Insights Profile – Passion Objective: Discover Your Passion Exercise: Prepare Your Passion Statement Activity: Identify Those Activities Which Give You the Greatest Energy Outcome: Passion Statement

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<b>Pillar 3: Goal Setting Performance</b>	12	Unique Gift Discovery	Pre-Work: Complete the Quality Life Insights Profile – Passion Objective: Discover Your Unique Gift Exercise: Prepare Your Unique Gift Statement Activity: Identify Your Greatest Activity by Combining Your Talents & Passion Outcome: Unique Gift Statement
	13	Dream Your Vision and Set The Mission	Pre-Work: Complete the Quality Life Insights Profile - Vision Objective: Discover Your Vision and the Mission for Achieving It Exercise: Prepare Your Vision and Passion Statements Activity: Consider Where You Want Your Life to be in 1, 5 and 20 Years Time Outcome: Vision and Mission Statements
	14	Identify Your Life Foundations (Values)	Pre-Work: Complete the Quality Life Insights Profile – Life Foundations Objective: Discover Your Life Foundations Exercise: Prepare Your Life Foundations Statement Activity: Identify Your Most Important Life Foundations Outcome: Life Foundations Statement
	15	Articulate Your Life Purpose	Pre-Work: Review Quality Life Insights Profile Objective: Discover Your Life Purpose Exercise: Prepare Your Life Purpose Statement Activity: Review Your Unique Gift, Vision and Life Foundations Statements Outcome: Life Purpose Statement
	16	Quality Life Needs and Wants Review	Pre-Work: Complete the Quality Life Insights Profile – Needs and Wants Objective: Prioritize Your Needs and Wants for a Quality Life Exercise: Quality Life Needs and Wants Exercise Activity: Specify Your 5 Most Important Short, Medium, Long Tern Needs & Wants Outcome: Prioritization of Your Short, Medium and Long Term Needs & Wants
	17	Setting Quality Life Goals	Pre-Work: Review Your Needs and Wants, Life Purpose and Current Environment Objective: Setting “SMART” Goals based on Your Purpose and Circumstances Exercise: Setting Quality Life Goals Exercise Activity: Identify 30 SMART Goals in 6 categories Outcome: Clarity and Commitment to Your Goals
<b>Pillar 4: Financial Planning Performance</b>	18	Inside Out Financial Planning	Pre-Work: Review the Core Life and Financial Directions Profiles Objective: Identify the Key Behavioral Influences on Your Financial Behavior Exercise: Inside Out Financial Planning Exercise Activity: Review Core Life Financial Planning and Financial Behavior Analysis Reports Outcome: Identification of Behavioral Areas to Address In Your Financial Plan
<b>Pillar 5: Investment Planning Performance</b>	19	Building a Behavioral Portfolio	Pre-Work: Review Your Behavioral Portfolio Report Objective: Identify Your Investment Portfolio Parameters Exercise: Building a Behavioral Portfolio Activity: Identify Your Investment Confidence With Asset Allocations Outcome: Identify the Portfolio Structure You are Emotionally Comfortable With
	20	Investment Policy Statement Preparation (Optional)	Pre-Work: Review Your Outside In Portfolio Based on Financial Position Objective: Compare Your Investment Emotions to Rationality Exercise: Tactical Portfolio Structure Review Activity: Compare Your Inside Out Portfolio Structure with an Outside In Model Outcome: Determination of Inputs to Your Investment Policy Statement
<b>Pillar 6: Quality Life Planning Performance</b>	21	Your Quality Life	Pre-Work: Consider the Elements of a Quality Life For You Objective: Prepare a Definition and Measurement Guidelines For Your Quality Life Exercise: Defining and Measuring Your Quality Life Activity: Write a Quality Life Statement and 5 Measurement Guidelines Outcome: A Memorable Quality Life Statement and Measurement Guidelines
	22	Your Decision-Making Matrix	Pre-Work: Review Your Life Purpose Statement Objective: Create a Structured Framework for Making the Right Choices Exercise: Your Decision Making Matrix Activity: Identify 5 to 8 Factors Which are Important Considerations in Decisions Outcome: Decision-Making Matrix
	23	Your Immediate Action Steps	Pre-Work: Review Your Top 30 Quality Life Goals Objective: Identify the Immediate Action Steps to Achieve Your Top 5 Goals Exercise: Your Immediate Action Steps Exercise Activity: Identify and Prioritize Your Top 5 Goals and Summarize the Action Steps Outcome: Immediate Action Steps to Start Living a Quality Life
	24	Your Learning for Transformation	Pre-Work: Reflect on Your Financial DNA Discovery Journey Objective: Identify Your Learning Experiences from the Financial DNA Process Exercise: Your Learning for Quality Life Transformation Activity: Identify 5 Points You Have Learned About Building a Quality Life Outcome: Awareness to Live a Quality Life