

Quality Life Discovery

DNA Quality Life Performance Report for Chris Coddington



Providing in-depth feedback to assist in optimizing the integration of your life and finances for building a Quality Life.

Based on completing your:

Financial DNA Natural Behavioral Discovery: 01 Oct, 2008

Financial DNA Quality Life Discovery: 27 Jul, 2011

Financial DNA® Quality Life Performance Report
Chris Coddington
27-Jul-11

Introduction

Chris, the primary objective of this report is to provide in-depth feedback to assist in optimizing the integration of your life and finances for building a Quality Life. This report uses results gathered from your Financial DNA Quality Life Discovery and results gathered from your completion of the Financial DNA Natural Behavior Discovery. This report is designed for you to ultimately improve your personal effectiveness, improve your happiness and fulfillment, and to develop and grow your relationship with others close to you. In particular, the focus of the report is to help you more productively apply your strengths and also manage your struggles so they do not become weaknesses and reduce your Quality Life Performance.

Report Format

- **Section 1:** Your Quality Life Sustainable Performance Index
- **Section 2:** Snapshot Analysis of Your Quality Life Performance Balance
- **Section 3:** Your Quality Life Performance Plan
- **Section 4:** Natural Behavior Style- Summary of Quality Life Behaviors based on your Financial DNA Natural Talents Discovery.
- **Sections 5.1-5.8:** Feedback on how you perceive your Quality Life across 80 attributes in the key areas of Life Purpose, Career, Finances, Health and Recreation, Community, Relationships, Confidence, and Wisdom

Scoring Methodology:

- As you will recall, you have rated in the Financial DNA Quality Life Discovery on a basis of 1-7. The scores will be reflected as "Self Assessment" in Sections 5.1 to 5.8, using the following criteria:
 1= Not at all 2= Hardly at all 3= To a small extent 4= Average
 5= To a moderate extent 6= For the most part 7= To a very great extent

DNA Quality Life Sustainable Performance Model



Section 1: Your Quality Life Sustainable Performance Index

Based on the results of your DNA Quality Life Discovery we have measured your Quality Life Sustainable Performance Index ("SPI"). Your Quality Life SPI measures your current Quality Life Performance capacity and shows your potential for Quality Life Performance growth. Knowing your current Quality Life Performance is the ideal starting point for building your DNA Quality Life Performance Plan. The performance objective is for you to increase your Quality Life SPI over time.

The Quality Life Performance strengths highlighted in this report indicate your areas of potential which need to be sustained. The development opportunities reflect your Quality Life Performance impediments which need further development. Once you have awareness of these areas of potential and impediments you can build your DNA Quality Life Performance Plan.

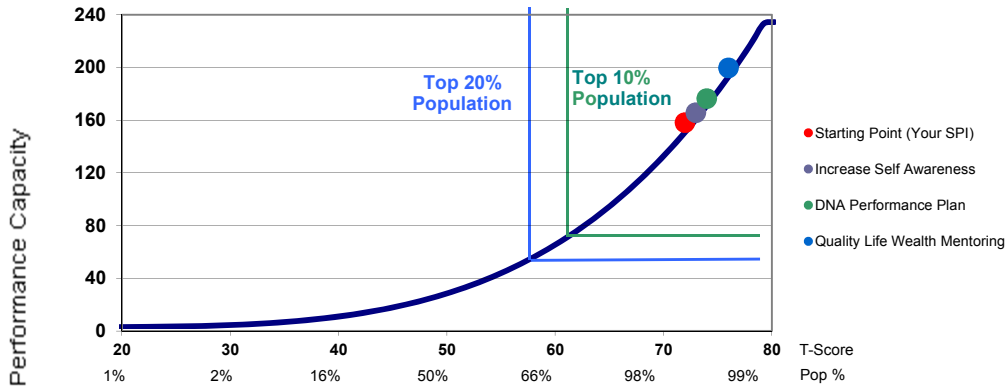
The graph below indicates your SPI score and the level of your performance against the general population. You will see from the graph the increase in capacity that can be achieved once you move into the top 20% of Quality Life Performance.

Your SPI reflects your Quality Life Performance in the following areas:

Sections 5.1-5.5	Performance Pathway:	87.79%
Section 5.6	Emotional Engagement:	87.14%
Section 5.7	Confidence:	95.71%
Section 5.8	Wisdom:	90.00%

Based on these scores your Quality Life SPI score is 158 which translates to a T-Score of 72. This means you currently perform at a higher level than 99% of the population.

Quality Life Sustainable Performance Index (SPI)



Improving your Quality Life Sustainable Performance Index

As you build your Quality Life Performance we suggest that you use your report in the following way to build your performance.

1. Increase Self Awareness	2. Create Your DNA Quality Life Performance Plan	3. Quality Life Wealth Mentoring
 <p>A diagram showing a central blue circle surrounded by eight yellow segments representing different life domains: Life Purpose, Career, Health and Wellness, Community, Relationships, Confidence, Wealth, and Wisdom.</p>	 <p>A screenshot of a spreadsheet titled 'DNA Quality Life Performance Plan' with various columns and rows for planning.</p>	 <p>A photograph of a woman and an older man sitting at a table, looking at documents together, representing a wealth mentoring session.</p>
<p>Review your Quality Life Performance Balance in Section 2 and a Summary of your Quality Life strengths and struggles in Section 3 to identify where you are currently at in living your Quality Life.</p> <p>Then, review your Natural DNA Behavior strengths and struggles in Section 4 to identify how your natural behavior is impacting your current Quality Life Performance.</p>	<p>Build a purpose based DNA Quality Life Performance Plan which optimizes the balance between your life and money.</p> <p>Start building your Quality Life Performance Pathway (refer Section 5.1-5.5) and Emotional Engagement (refer Section 5.6) of others based on greater self awareness of your Quality Life strengths and development opportunities highlighted in this report.</p>	<p>Then, regularly work with your Wealth Mentor to increase your confidence (refer Section 5.7) and practice smart behaviors by making wise decisions (refer Section 5.8)</p>

Section 2: Snapshot Analysis of Your Quality Life Performance Balance

DNA Quality Life Performance: Based on the results of your Quality life Performance Discovery we have measured your current level of DNA Quality Life Performance. DNA Quality Life Performance is the ability to optimize the balance of your life and finances for living a Quality Life on a sustainable basis.

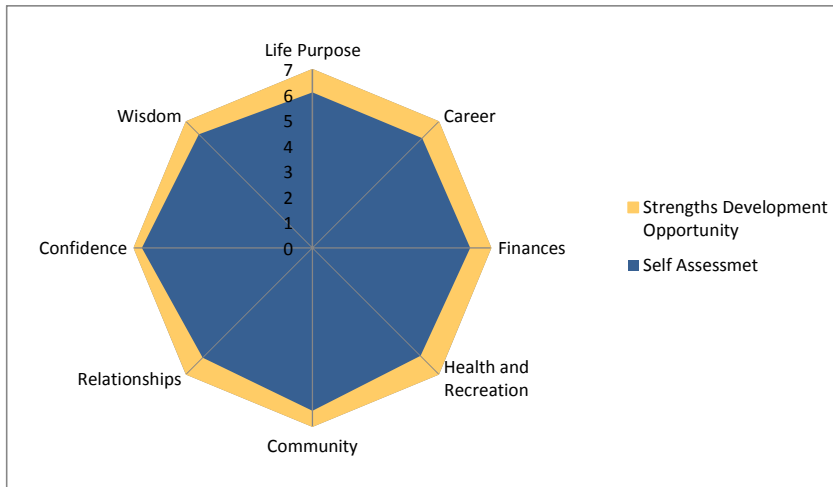
The graph below reflects 8 key areas of your Quality Life Performance based on the current perceptions you have of your life and finances. This is the ideal starting point for you in building a Quality Life Performance Plan and achieving your life and financial goals. Each of these 8 areas are completely interconnected. The challenge is sustaining high performance in all 8 of them at the same time.

The key to successfully managing this balance at a high level will be your Natural DNA Behavior. Based on your Natural DNA Behavior style there will be Quality Life areas in which you have strengths that drive performance and others which you struggle with that if not managed will be an impediment to performance.

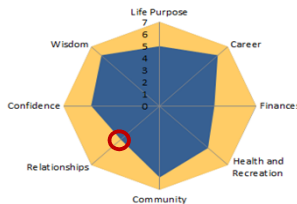
The **Strength Development Opportunity** represents the differences between the maximum rating of 7 and your current self assessment. Any areas with significant differences should be discussion points between yourself and your advisor in building your quality life plan and making your life decisions.

The graph below represents your DNA Quality Life Performance in the following areas based on a maximum score of 7.

DNA Quality Life Performance Category	Current Self Assessment	Strengths Development Opportunity
Life Purpose	6.1	0.9
Career	6.1	0.9
Finances	6.2	0.8
Health and Recreation	6	1
Community	6.4	0.6
Relationships	6.1	0.9
Confidence	6.7	0.3
Wisdom	6.3	0.7



No one is perfect but a perfect Quality Life Performance graph would appear such as this with the whole graph shaded.



While all 8 areas of your Quality Life Performance are important to your overall success, focus on areas which require the most attention. Start by identifying the area on the graph which is closest to the center as this is your greatest current struggle e.g. your Highest Strength Development Opportunity.

Section 3: Your Quality Life Performance Plan

Your DNA Quality Life Performance Plan has been developed to highlight specific areas of your life. Your Quality Life strengths have been highlighted in Section A and provide feedback on items of which you currently excel at in your life. In Section B, your Quality Life Performance Development Opportunities have been provided as areas which should first be addressed in your Quality Life Performance Plan.

A. Your Quality Life Strengths:

Your Quality Life Strengths are the 10 items in which you perceive your current performance to be the highest in, out of the 80 total items in the Quality Life Performance Discovery process. The development focus is to encourage you to maintain your current level of Quality Life Performance in these areas.

	Quality Life Performance Attribute	Category	Self Assessment (A)	Your Strengths Development Opportunity (Max score of 7 minus A)
1	80. I am able to make informed decisions based on my values	Wisdom	7	0.0
2	78. I can confront challenges in a timely and effective manner	Wisdom	7	0.0
3	73. I perform appropriate research on the decisions I make	Wisdom	7	0.0
4	70. I do not live in fear when things go wrong	Confidence	7	0.0
5	69. I am comfortable being transparent with others	Confidence	7	0.0
6	68. I am able to acknowledge my mistakes	Confidence	7	0.0
7	66. I am open with ideas and information	Confidence	7	0.0
8	64. I can delegate responsibility to others and not interfere	Confidence	7	0.0
9	62. I am confident in the decisions I make	Confidence	7	0.0
10	61. I believe in my self	Confidence	7	0.0

B. Your Quality Life Struggles

Your Quality Life Struggles are the 10 items in which you perceive your current performance to be the lowest in, out of the 80 total items in the Quality Life Performance Discovery process. The development focus on these items is to encourage you to manage these struggles in order to increase your current level of quality life performance.

	Quality Life Performance Attribute	Category	Self Assessment (A)	Your Strengths Development Opportunity (Max score of 7 minus A)
1	4. I have a meaningful purpose statement to guide future decisions	Life Purpose	5	2.0
2	5. I am focused on pursuing my passions	Life Purpose	5	2.0
3	13. I have a similar happiness on working and non-working days	Career	5	2.0
4	17. I do not feel burned out by my work	Career	5	2.0
5	18. My role provides an appropriate work life balance	Career	5	2.0
6	25. I have planned for buying life experiences	Finances	5	2.0
7	26. I spend money on others instead of always on myself	Finances	5	2.0
8	37. I have regular planned free time	Health and Recreation	5	2.0
9	57. I have friends, family, colleagues who share my passions	Relationships	5	2.0
10	1. I am clear about who I am	Life Purpose	6	1.0

C. Your Quality life Performance Development Priorities:

Your Quality Life Performance Development Priorities provide a ranking of which Quality Life Performance categories you should address first in developing your Quality Life Balance. A rank of 1 indicates this category will require the most attention in your DNA Quality Life Performance Plan and a score of 8 indicates that this category would need the least amount of time for development.

	Quality Life Performance Attribute	Self Assessment (A)	Your Strengths Development Opportunity (Max score of 7 minus A)
1	Health and Recreation	6.0	1.0
2	Life Purpose	6.1	0.9
3	Career	6.1	0.9
4	Relationships	6.1	0.9
5	Finances	6.2	0.8
6	Wisdom	6.3	0.7
7	Community	6.4	0.6
8	Confidence	6.7	0.3

D. Building Your Quality Life Performance Balance

Managing your Quality Life Performance Balance is difficult. The key to improving your balance and therefore Quality Life Performance Growth is to firstly address your top 2 "Strengths Development Opportunities" identified in section C above. Your success in developing your Quality Life will be largely impacted by your Natural DNA Behavior and a determination to make the necessary life changes.

Quality Life Performance Development Priorities	Health and Recreation	Life Purpose
Quality Life Goal	Plan to exercise 5 hrs per week, sleep 7 to 8 hrs per day and have additional free time.	Identify more clearly your calling in life based on your talents, passions, vision and values.
Behavioral Strengths and Struggles for achieving your Quality Life Goal		
Risk Taker Strength	Will spend time with "on the edge" pursuits	Optimistic about the future which will increase with personal clarity
Risk Taker Struggle	May sustain injuries from taking the wrong chances	May try too many things out and lose their way
Risk Taker Question	What experiential activities would you like to do more of?	What opportunities for your future direction would excite you?
Fast-Paced Strength	Will be calculated to make it happen	Welcomes making changes
Fast-Paced Struggle	May tend to over activity	Can expect outcomes too quickly
Fast-Paced Question	What are you doing to ensure that you fit in enough sleep and exercise into each day?	What activity gives you the greatest energy?

Section 4: Financial DNA Natural Behavior Discovery Summary

Your Financial DNA Natural Behavior Style: 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.

Your Performance Strengths

Knowing your strengths, you can increase your performance potential.

- Ventures into new areas
- Faces danger comfortably
- Demonstrates courage
- Favors logic over feelings
- Comfortable making difficult decisions

Your Performance Struggles

Knowing your struggles, you can reduce your performance impediments.

- May take unnecessary risks
- May not see the dangers
- May lack needed patience

Your Performance Environment Keys

The Performance Environment Keys indicate the required setting for your maximum performance.

- Present me with opportunities
- Present me with the risks and return
- Keep the discussion positive
- Anticipate my immediate responses and quick fixes
- Speak/move at a quick pace

Engaging You in Conversation:

- What has been a success for you recently?
- What is your main goal right now?
- What projects are you currently working on?

Approach to the Financial Advisory Process

Strategists synthesize a broad array of facts, events and concepts in order to develop long-range plans and improve results. They typically see the larger vision well ahead of others and are often considered visionaries or entrepreneurs. They have the ability to succinctly determine objectives, and will expect their advisor to assist them in determining a strategic investment plan, and researching high-quality investment opportunities that will achieve their aims.

- Describe a time when your decision-making skills failed. How did that make you feel? What did you learn from this incident?
- Consider how easy it would be for a member of your family or your advisor to approach you about your decisions. Are you approachable? Will you listen to them?
- How are you progressing toward your goals? What accountability processes do you need to help you follow through on your goals?

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 the Financial DNA Natural Behavior Discovery, your primary Quality Life Behavioral Attitudes are summarized in the table below.

	Quality Life Attitude 1 : Risk Taker Factor	Quality Life Attitude 2 : Fast-Paced Factor
Communication	High returns	Get to the point
Quality Life Outlook	Adventure	Change
Activity Passion	Being venturesome	Task focus
Life Values	Take your chances	Logic
Strength	Has courage	Rational
Blind Spot	Takes unnecessary risks	Impatient
Wealth Creation Philosophy	Optimistic	Calculated
Financial Attitude	Risk taker	High returns
Financial Goal Setting	Opportunistic	Dynamic
Planned Giving Motivation	Create new opportunities	Seeing outcomes

Financial Planning Insights

Based on combinations of the behavioral factors in your natural behavioral style, your natural approach to financial planning is set out in the table below.

Insight	L/M/H	Population% (1-100%)
Sets the Agenda for the Planning Process	HIGH	84%
Patiently Builds Long-term Relationships	LOW	4%
Focus on Bottom Line Results	HIGH	98%
Risk Propensity for Taking Chances	HIGH	99%
Risk Tolerance for Living With Losses	HIGH	99%
Sets Goals for Ambitious Plans	HIGH	96%
Pursues Goals to Stay Focused on the Plan	HIGH	96%
Comfort to Deal With Change and Make Decisions	HIGH	92%
New Idea Driven for Investing in Solutions and Products	HIGH	93%
Financially Organized and Follows Budgets	MEDIUM	62%
Need for Information, Research and Analysis	MEDIUM	66%
Spending Desire on Lifestyle Items	MEDIUM	31%
Need for Control Over Financial Planning Decisions	HIGH	92%

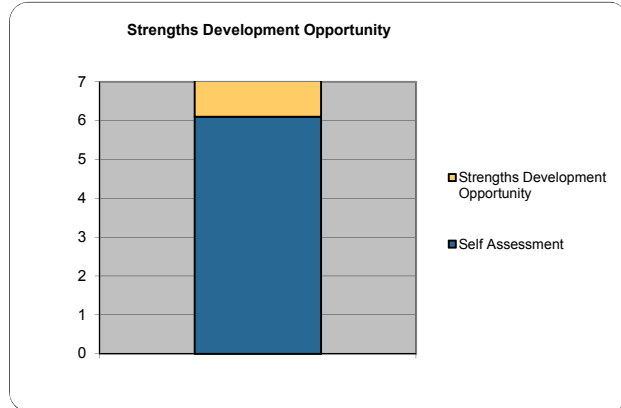
Section 5.1: Performance Pathway- Life Purpose

Integral to building a Quality Life is life purpose. Life purpose is the core foundation and values by which you live your life. This is the framework from which all your Quality Life goals should be set and decisions made. It also represents your calling in life, the very essence of your existence, and will become why you do what you do.

Total Maximum Rating: 7

– Self Assessment 6.1

Overall Strengths Development Opportunity: 0.9



Performance Pathway: Life Purpose Attributes	Self Assessment (A)	Strengths Development Opportunity (Max score of 7 minus A)
1. I am clear about who I am	6.0	1.00
2. I recognize the importance of my life journey on who I am	6.0	1.00
3. I have a clear understanding of the influences that drive my choices	6.0	1.00
4. I have a meaningful purpose statement to guide future decisions	5.0	2.00
5. I am focused on pursuing my passions	5.0	2.00
6. My vision and values are clearly defined and communicated	6.0	1.00
7. I have clarity about my goals and future intentions	7.0	0.00
8. I am currently living a standard of life that I want	7.0	0.00
9. I have a healthy spiritual life	6.0	1.00
10. I have a personal legacy that I wish to pass on to others	7.0	0.00

1. What activities would bring more meaning into your life?

Taking part in frequent life experiences or vacation adventures with my family.

2. What changes do you need to make to bring more meaning to your life?

Balancing time between meaningful out of work experiences with my working life.

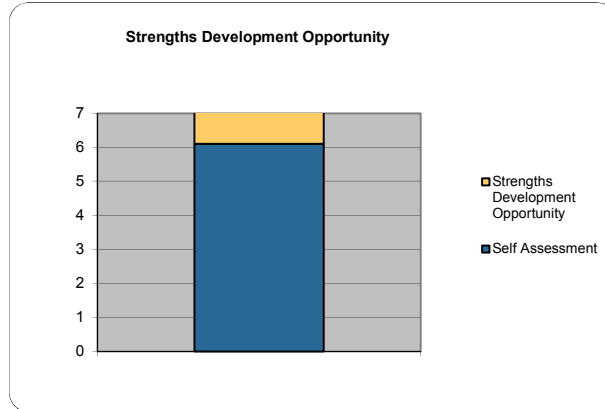
Section 5.2 Performance Pathway- Career

Integral to building a Quality Life is your level of career engagement. The level of career engagement that you have is driven by the ability to productively use your strengths in your work. Further, it includes working in an environment that meets your values, allows you to build happy workplace relationships and provide an overall work life balance that enables all other areas of your life to grow.

Total Maximum Rating: 7

– Self Assessment 6.1

Overall Strengths Development Opportunity: 0.9



Performance Pathway- Career Attributes	Self Assessment (A)	Strengths Development Opportunity (Max score of 7 minus A)
11. I am productively using my strengths every day at work	7.0	0.00
12. I look forward to going to work each day	7.0	0.00
13. I have a similar happiness on working and non-working days	5.0	2.00
14. I have a leader or manager who makes me feel enthusiastic	6.0	1.00
15. I spend time with people I enjoy being around at work	6.0	1.00
16. I am able to live my values at work	7.0	0.00
17. I do not feel burned out by my work	5.0	2.00
18. My role provides an appropriate work life balance	5.0	2.00
19. I am able to live some of my life dreams by going to work	6.0	1.00
20. I am able to take on challenges that I enjoy	7.0	0.00

1. What work do you enjoy doing the most?

Packaging up solutions and making strategic partnerships.

2. Are there any activities you would like to be focusing your attention more on?

Networking with my local business community.

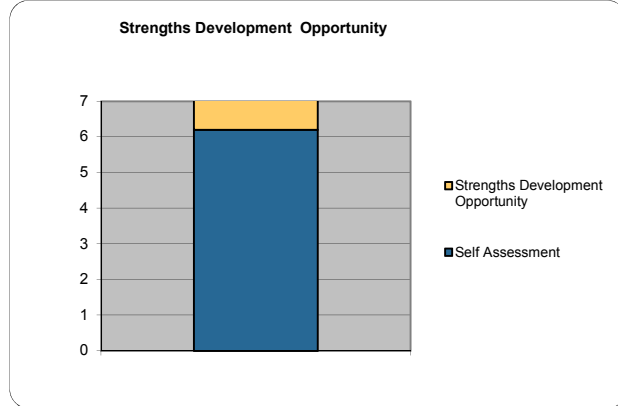
Section 5.3: Performance Pathway - Finances

Foundational to your ability to build a Quality Life is to have a financial plan and financial goals that are integrated to every dimension of your life. Having high self awareness and a healthy relationship with yourself is the starting point for financial clarity. This will be a significant factor in how you build, protect and utilize your financial resources.

Total Maximum Rating: 7

- Self Assessment 6.2

Overall Strengths Development Opportunity: 0.8



Performance Pathway- Finances Attributes	Self Assessment (A)	Strengths Development Opportunity (Max score of 7 minus A)
21. My financial affairs are in order	6.0	1.00
22. I have a strong financial plan that addresses wealth creation	7.0	0.00
23. I have disciplined saving and budgeting habits	6.0	1.00
24. I have solid cash flow to meet my needs	7.0	0.00
25. I have planned for buying life experiences	5.0	2.00
26. I spend money on others instead of always on myself	5.0	2.00
27. I feel confident about my financial future	6.0	1.00
28. I follow through on achieving my financial goals	6.0	1.00
29. I regularly review and keep track of key financial information	7.0	0.00
30. I have had appropriate financial education to make informed	7.0	0.00

1. What has been the best financial decision you have made?

Diversifying my assets into real estate.

2. What steps could you take to improve your finances?

By using my prior experience when making future financial decisions.

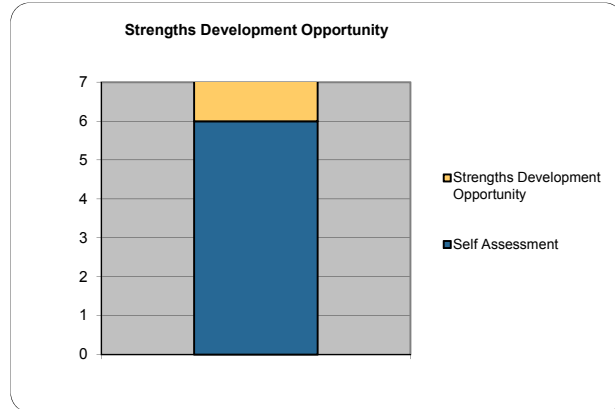
Section 5.4: Performance Pathway - Health and Recreation

The sustainability of your Quality Life will be significantly influenced by having sound health. Sound health enables you to live a full and vital life in every area. Your capability to earn income, participate in physical and community activities over a long period is directly related to your health.

Total Maximum Rating: 7

- Self Assessment 6

Overall Strengths Development Opportunity: 1



Performance Pathway- Health and Recreation Attributes	Self Assessment (A)	Strengths Development Opportunity (Max score of 7 minus A)
31. I exercise regularly during the week	6.0	1.00
32. I am involved in playing a sport that I enjoy	6.0	1.00
33. I have an interest outside work	7.0	0.00
34. I have sound health that allows me to do the activities I want	6.0	1.00
35. I have regular health and dental check up's	6.0	1.00
36. I am able to take regular vacations without working	6.0	1.00
37. I have regular planned free time	5.0	2.00
38. I have enough good sleep each night	6.0	1.00
39. I eat healthily on a regular basis	6.0	1.00
40. I do not live with high stress	6.0	1.00

1. What activities do you pursue to stay healthy?

Running, Biking and playing golf

2. If you had more planned free time, what activities would you pursue?

Play more golf, spend more frequent time outside.

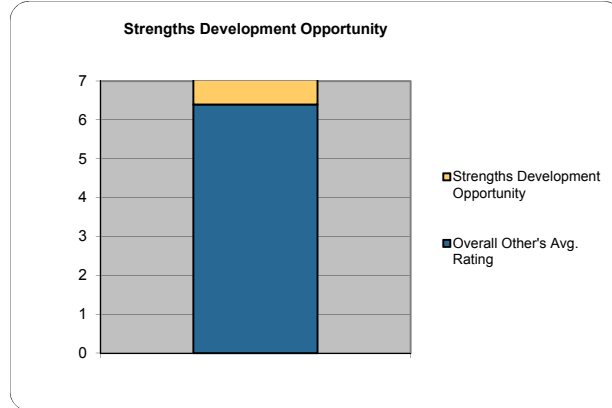
Section 5.5: Performance Pathway - Community

Investing in the lives of other people in your community in areas that relate to your life purpose significantly add to your Quality Life. Participating and contributing in community activities will add to the meaning of your life and the quality of all your life relationships. Community participation in an authentic way that fits your nature and values will help your life grow.

Total Maximum Rating: 7

– Self Assessment 6.4

Overall Strengths Development Opportunity: 0.6



Performance Pathway - Community Attributes	Self Assessment	Strengths Development Opportunity (Max score of 7 minus A)
41. I participate in activities that involve community giving	6.0	1.00
42. My community giving is related to my life purpose	6.0	1.00
43. I have a plan for giving my time, talents and resources	7.0	0.00
44. My giving improves my social life	6.0	1.00
45. Where I live is good for my community involvement	6.0	1.00
46. I have experienced how my life has grown through community giving	7.0	0.00
47. My community activities are part of my legacy	6.0	1.00
48. I communicate the value of planned giving to others	7.0	0.00
49. I believe participating in a planned giving program will make my life better and more meaningful	7.0	0.00
50. The most important giving consideration is the worthiness of the cause and not tax benefits	6.0	1.00

1. What types of community activities are you involved with?

Youth Development and Career Planning for individuals age16-23.

2. What could you do to be more involved with your community?

Participate in more social community gatherings.

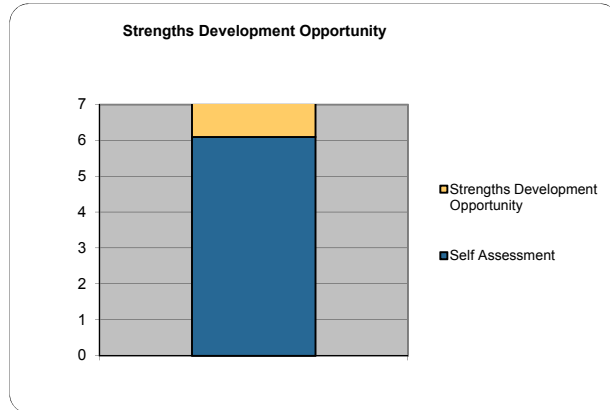
Section 5.6: Relationships

A dominating factor determining the Quality Life Performance of any person is his or her ability to build lasting relationships. A true relationship builder gets improved results by constantly demonstrating understanding, patience, listening skills and empathy for his or her spouse or partner, family members, friends, associates and others that they interact with. They are focused on investing in the development of others whether they be family members, friends, colleagues or community members.

Total Maximum Rating: 7

– Self Assessment 6.1

Overall Strengths Development Opportunity: 0.9



Relationship Attributes	Self Assessment	Strengths Development Opportunity (Max score of 7 minus A)
51. I am comfortable engaging with others in open dialogue	7.0	0.00
52. I spend plenty of time each day socializing with friends, family and colleagues	6.0	1.00
53. I am expanding the connections in my network	7.0	0.00
54. I mix social time with physical activity	6.0	1.00
55. I am deepening my relationships with people I value	6.0	1.00
56. I spend time with people I enjoy being around at work and out	6.0	1.00
57. I have friends, family, colleagues who share my passions	5.0	2.00
58. I place importance on adapting my communication to others	6.0	1.00
59. Differences with others are embraced and respected	6.0	1.00
60. My interactions with others are positive and constructive	6.0	1.00

1. How do you keep regularly connected with family and friends?

Occasionally catch up at regularly scheduled times.

2. What could you do more of to build your relationships?

Follow up with friends, family and potential business contacts more frequently.

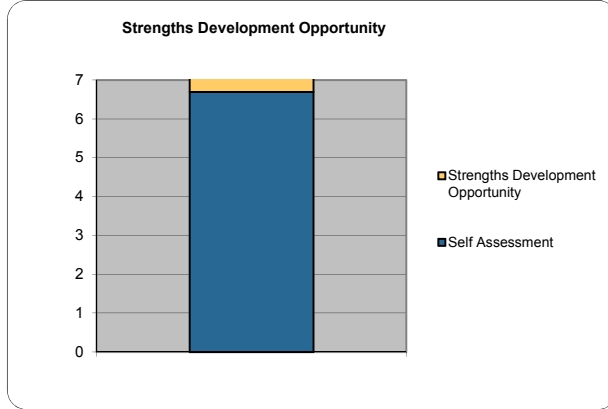
Section 5.7: Confidence

A person's ultimate ability to build and sustain Quality Life Performance is confidence. The primary source of confidence is your level of personal trust. In order to gain the trust of others, a person must first learn to have the confidence to trust him or herself and then secondly trust others. This confidence will come from self belief and not allowing fear to take over. The ability of an individual to trust him or herself will determine whether there is trust in all of their decisions and life pursuits, and also inside their relationships.

Total Maximum Rating: 7

– Self Assessment 6.7

Overall Strengths Development Opportunity: 0.3



Confidence Attributes	Self Assessment	Strengths Development Opportunity (Max score of 7 minus A)
61. I believe in my self	7.0	0.00
62. I am confident in the decisions I make	7.0	0.00
63. I could productively use my talents for multiple careers	6.0	1.00
64. I can delegate responsibility to others and not interfere	7.0	0.00
65. I am comfortable to share my emotions and feelings	6.0	1.00
66. I am open with ideas and information	7.0	0.00
67. I have financial freedom	6.0	1.00
68. I am able to acknowledge my mistakes	7.0	0.00
69. I am comfortable being transparent with others	7.0	0.00
70. I do not live in fear when things go wrong	7.0	0.00

1. What types of decisions do you feel comfortable making?

Decisions when I am able to minimize the risks by knowing the facts.

2. What types of decisions do you find difficult to make?

Where the bottom line and risks are unknown or not presented.

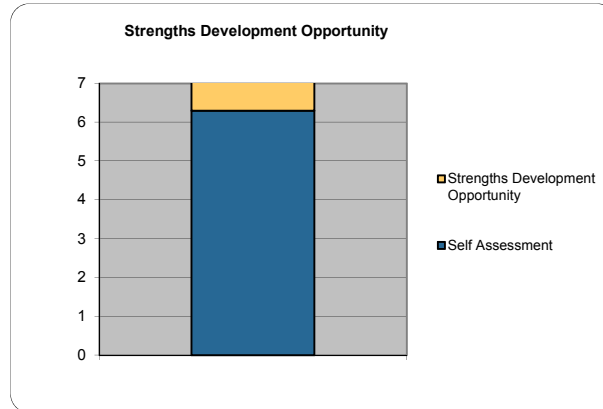
Section 5.8: Wisdom

The core of any person's decisions will be his or her values and the ability to act with wisdom. This will be foundational for the person in the sustained building of a Quality Life. Without demonstrating strong values, a person will not have a strong framework to protect their life and finances on a long-term basis.

Total Maximum Rating: 7

– Self Assessment 6.3

Overall Strengths Development Opportunity: 0.7



Wisdom Attributes	Self Assessment (A)	Strengths Development Opportunity (Max score of 7 minus A)
71. I follow policies, procedures and regulations when making decisions	6.0	1.00
72. I monitor my plans based on my life purpose	6.0	1.00
73. I perform appropriate research on the decisions I make	7.0	0.00
74. I have a sounding board to keep me on track	6.0	1.00
75. I am able to make changes in my life when I need to	6.0	1.00
76. I can balance my daily actions with my long term objectives	6.0	1.00
77. My walk matches my talk in all of my interactions	6.0	1.00
78. I can confront challenges in a timely and effective manner	7.0	0.00
79. I am investing in learning more to increase my skills and competencies in new areas	6.0	1.00
80. I am able to make informed decisions based on my values	7.0	0.00

1. What is the best decision you have ever made?

The decision to maintain my direction on my life purpose.

2. What could you do more of to improve decision-making?

Focus more on what makes me happy and can contribute to my overall well being.

Disclaimer

DNA Quality Life Performance Report:

The purpose of this instrument is educational. It is designed to help people identify their natural Quality Life Performance strengths and struggles for making life, financial and investment decisions. The DNA Quality Life Performance Report should not be used to identify, diagnose, or treat psychological, mental health, and/or medical problems. Additionally, if this report is 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 this aid to self-discovery. By using the DNA Quality Life Performance Report you expressly waive and relinquish any and all claims of any nature against DNA Behavior International, any affiliated companies, and/or their employees arising out of or in connection with the use of this survey.

Next Steps

1. Financial Personality Discovery Process:

This process involves the completion of your Financial Personality Discovery. The DNA Financial Performance report provides an in-depth analysis of your complete Financial DNA®, to identify how your financial personality will influence the financial and investment decisions that you make for sustainable financial performance.

2. Behavioral Investment Policy Statement

The next step in the financial planning process is to use the insights from this DNA Financial Performance Report and commence building a Behavioral Investment Policy Statement (IPS). The IPS will allow you and your advisor to agree on specific investment decisions and the strategies by which to attain your overall life and financial goals. A sound long-term plan will protect your investment portfolio from spur-of-the-moment decisions in reaction to short-term market trends.

3. Further Financial Education

We have a number of education programs available for investors and financial advisors to enhance their understanding of the Financial DNA Solutions and how to use them in the financial planning process. Please contact us at inquiries@dnabehavior.com for more information and access to these programs.