

Financial DNA®  
Natural Behavior Discovery

Summary Report  
for  
Chris Coddington

Providing key behavioral insights into how you naturally approach the financial planning process.



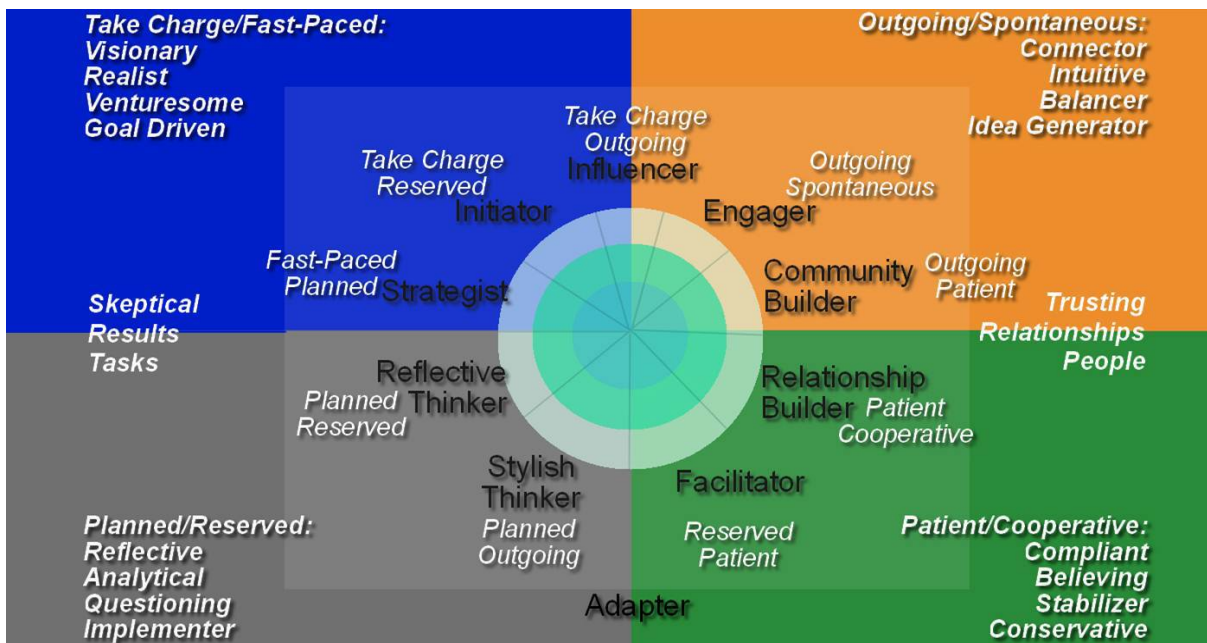
Based on your Completion of the Natural Behavior Discovery on: March 14,2012

Financial DNA Natural Behavior Summary Report for: Chris Coddington  
 Your DNA Natural Behavior Style: Strategist

*Strategists naturally blend their strong drive to reach key goals with sound knowledge, high quality processes and quality control standards. 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 rational, impartial approach that enhances their ability to make difficult decisions.*

**Summary of DNA Natural Behavior - The 10 Unique Styles**

The graph highlights your unique style in relation to other people. This will help you to see your natural behavior similarities and differences to others more clearly.



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?

**Building Relationships**

Sharing Builds Trust and Relationships – Share your Report with people that you interact with.

Your Performance Strengths	Your Performance Struggles
<p><i>Knowing your strengths, you can increase your performance potential.</i></p> <ul style="list-style-type: none"> <li>• Takes initiative</li> <li>• Goal driven</li> <li>• Accepts challenges</li> <li>• Thinks matters through</li> <li>• Able to ask difficult questions</li> </ul>	<p><i>Knowing your struggles, you can reduce your performance impediments.</i></p> <ul style="list-style-type: none"> <li>• May sacrifice a balanced life</li> <li>• Can be overly vigorous</li> <li>• May have difficulty letting matters go</li> </ul>

### Your Performance Environment Keys

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

- Provide me with the big picture
  - Present me with action plans
  - Keep me informed of progress
- Expect me to ask for the logic and key points
  - Remember my need to do analysis

### Quality Life Behavioral Attitudes

Your natural motivations, desires and approach to building a Quality Life are often influenced by the strongest traits in your natural behavioral style. Based on the two strongest behavioral factors in your Natural Behavior, your primary Quality Life Attitudes are summarized in the table below.

	Quality Life Attitude 1 Pioneer Factor	Quality Life Attitude 2 Skeptical Factor
Quality Life Outlook:	Being progressive	Protective of information
Wealth Creation Philosophy:	Goal driven	Watchful
Financial Attitude:	Achievement driven	Guarded
Financial Goal Setting Approach:	Ambitious	Asks difficult questions
Activity Passion:	Accepting challenges	Critical thinking
Values:	Taking action	Discovering the truth
Planned Giving Motivation:	Having high impact	Provide accountability
Strength:	Takes initiative	Watchful
Blind-spot:	Too focused	Fearful
Communication:	Provide big picture	Be logical


## Financial Planning Insights

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

Insight	L/M/H	Population% (0-100%)
Sets the Agenda for the Planning Process	HIGH	96%
Patiently Builds Long Term Relationships	LOW	1%
Focus on Bottom Line Results	HIGH	98%
Risk Propensity for Taking Chances	HIGH	98%
Risk Tolerance for Living With Losses	HIGH	99%
Sets Goals for Ambitious Plans	HIGH	99%
Pursues Goals to Stay Focused on the Plan	HIGH	96%
Comfort to Deal With Change and Make Decisions	HIGH	90%
New Idea Driven for Investing in Solutions and Products	HIGH	82%
Financially Organized and Follows Budgets	MEDIUM	69%
Need for Information, Research and Analysis	HIGH	95%
Spending Desire on Lifestyle Items	LOW	8%
Need for Control Over Financial Planning Decisions	HIGH	93%

## Natural Behavior Investment Portfolio Parameters

Your standard Natural Behavior Investment Portfolio group for determining the structure of your investment portfolio is indicated below. Your Investment Portfolio Group has been determined based on the blend of your natural behavior Risk Propensity and Risk Tolerance as summarized in the table above. However, your actual Risk Propensity and Risk Tolerance for making investment decisions will be influenced by your current financial capacity and preferences that have evolved from circumstances, experiences and education.



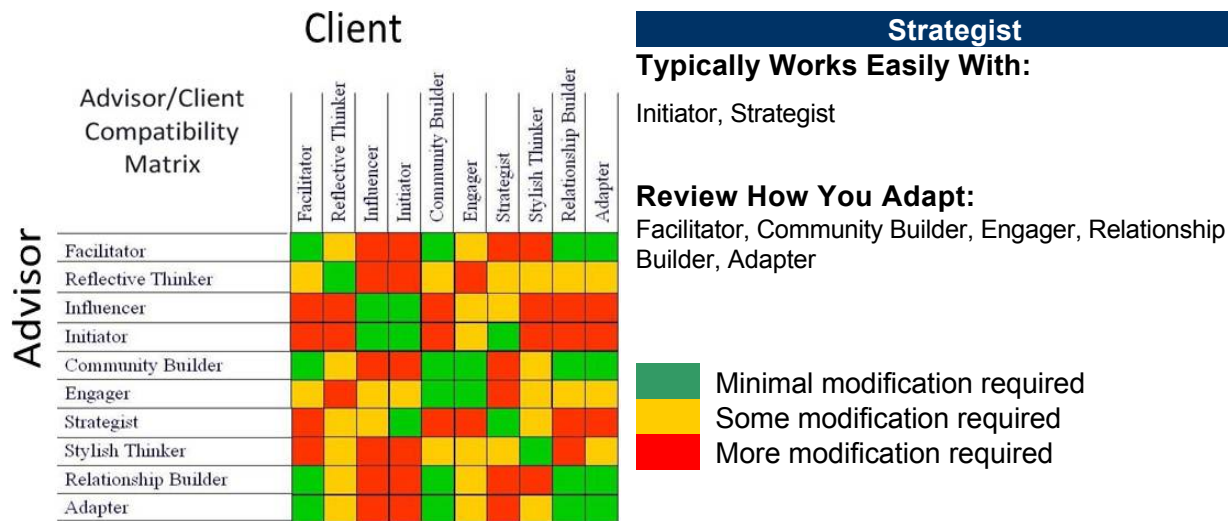
	Group 1	Group 2	Group 3	Group 4	Group 5	Group 6	Group 7
Pop. % in this category	<2%	2-18%	19-30%	31-69%	70-81%	82-98%	>98%
Portfolio Structure	Capital Protection	Ultra-Conservative	Conservative	Balanced	Accumulation	Growth	Aggressive

## Advisory/Client Compatibility

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

The graph below shows, for the Strategist style, those persons with whom you will most easily relate to because you are generally closer in relationship style, and hence minimal behavioral modification required. Also, it shows those DNA Natural Behavior styles with whom you will have to more closely review how you each adapt because there are greater differences, and hence more behavioral modification required.

Adapting your behavior to relate to another person requires concentrating more on your level of self-awareness when you are with that person. However, when a person is different from you there are also many benefits because of their different perspectives. While recognizing that natural behavior is important, also sharing common values, beliefs and attitudes is important for building a successful relationship.



## Disclaimer

The purpose of this instrument is educational. It is designed to help people identify their natural behavioral strengths and struggles for making life, financial and investment decisions. The Financial DNA Natural Behavior 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 Financial DNA Natural Behavior 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.

## Additional Reports

- If you would like to learn more about your life and financial decision making behavior and to get further guidance, please review your Wealth Mentoring Report.
- For more information, please email us at [inquiries@dnabehavior.com](mailto:inquiries@dnabehavior.com).