

Summary of DNA Profiles and Products

Human Behavioral Solutions for Transforming Business and Personal Performance



	Profile or Tool	Time to Complete	Outcome	Application	✓
DNA Marketing®	Communication DNA Profile	2-5 Mins	Communication preferences	Improve engagement of clients and employees	
DNA Behavior®	Natural Behavior Profile	10-15 Mins	Natural Behavior		
	▪ Life Planning Report		Life planning insights	Setting life direction	
	▪ Coaching Report		Life planning strengths and struggles	Talent development	
Financial DNA®	Core Life Motivations Profile	10-15 Mins	Natural Financial Behavior		
	▪ Financial Planning Report		Financial planning insights	Customization of financial planning process	
	▪ Risk Management Report		Risks to financial planning	Improve financial management	
	▪ Wealth Mentoring Report		Financial strengths and struggles	Enhance relationship to money	
	Financial Directions Profile	15-20 Mins	Learned Financial Behaviors	Financial plan creation	
	▪ Behavioral Portfolio Report		Portfolio parameters	Inside-out portfolio creation	
	▪ Financial Behavior Analysis		Personal financial alignment	Financial decision-making development	
	Quality Life Insights Profile	60-90 Mins	Environmental influence, passion, vision, life foundations, experiences, needs and wants	Life purpose discovery	
	Quality Life Financial Plan Workbook		Process for building a quality life plan	Setting committed goals; Decision-making matrix	
Business DNA®	Natural Talents Profile	10-15 Mins	Natural Workplace Behavior		
	▪ Workplace Operations Report		Identify workplace talents	Role and team alignment	
	▪ Risk Management Report		Risks to business performance	Improve workplace management	
	▪ Coaching Report		Business strengths and struggles	Business performance enhancement	
	Leadership Engagement 360 Profile	10-15 Mins	Perceptions of leadership communication, results, relationships, EQ, trust, values, competence	Leadership development	
	Sales Engagement 360 Profile	10-15 Mins	Perceptions of sales communication, results, relationships, EQ, trust, values, competence	Sales team development	
	Advisor Engagement 360 Profile	10-15 Mins	Perceptions of advisor communication, results, relationships, EQ, trust, values, competence	Advisor development	
	Business Engagement 360 Profile	10-15 Mins	Perceptions of corporate communication, results, customer engagement, supplier engagement, leadership, values, operational competence	Business engagement review	
Family DNA®	Core Family Life Motivations Profile	10-15 Mins	Natural Family Behavior		
	▪ Financial Planning Report		Family decision-making insights	Customization of family discussions	
	▪ Risk Management Report		Risks to family dynamics	Improve family financial management	
	▪ Wealth Mentoring Report		Family strengths and struggles	Enhance family interaction	
	Futurity Profile	60 Mins	Family member attitudes to wealth creation, wealth transfer, family business, philanthropy	Family map creation for decision-making	
	Family Engagement 360 Profile	10-15 Mins	Perceptions of family communication, results family member engagement, trust, family leadership, values, financial competence	Family engagement review	
	Family Quality Life Review	2-5 Mins	Family life pulse check	Hi spot family review	

	Profile or Tool	Time to Complete	Outcome	Application	✓
Philanthropy DNA®	Core Planned Giving Profile	10-15 Mins	Natural Planned Giving Behavior		
	▪ Financial Planning Report		Financial planning insights	Customization of planned giving process	
	▪ Wealth Mentoring Report		Planned giving strengths and struggles	Build planned giving plan and legacy	
Entrepreneurship DNA®	Natural Talents Profile	10-15 Mins	Natural Entrepreneurship Behavior		
	▪ Business Growth Report		Identify entrepreneurial talents	Improve business productivity	
	▪ Success Coaching Report		Entrepreneurial strengths and struggles	Entrepreneurial performance enhancement	
Career Life DNA®	Career Life DNA Profile	15-20 Mins	Learned behaviors, skills, knowledge, competence, influencing career choices	Establish career direction	
	Career Life Insights Profile	60-90 Mins	Environmental influence, passion, vision, life foundations, experiences, needs and wants	Career purpose discovery	
	Career Life Plan Workbook		Process for building a career plan	Setting career and life goals; Decision-making matrix	