



Instructions for Financial DNA[®] Path 4 Profile

Purpose

The Financial DNA[®] Path 4 Profile, powered by RightPath Resources, gives detailed insight into the behaviors, goals and motivations of an individual in relation to their financial and business decision making.

Guidelines

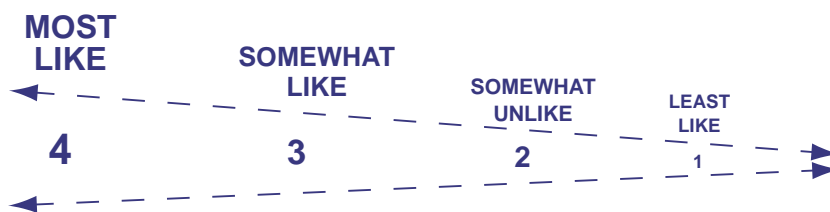
- This is an **assessment**, not a test. Therefore, there are no right or wrong answers.
- Personality assessments tend to be influenced by the mental focus a person has when responding. The focus of this assessment is your natural, enduring behavioral traits.
- The key to an accurate assessment is YOUR willingness to be realistic about your natural behavior.

As You Choose...

- Answer based on your instinctive behavior, regardless of whether you consider it to be good or bad.
- Work quickly. Avoid agonizing over your choices.
- Your INITIAL CHOICE or reaction usually will be the best choice.

Directions

1. There are four words on each horizontal line.
2. Rate each word using a 4, 3, 2, 1 scale.
3. Use **4** for the word that is **MOST** like your natural behavior, and **1** for the word that is **LEAST** like you.
4. Use all ratings (4, 3, 2 and 1) in each line and **use each rating only once**.
5. Rate the words in the manner that most accurately describes the “real you.”
6. Study the example below before starting:



Correct Example A: Enthusiastic Loyal Detailed Commanding

Incorrect Example B: Enthusiastic Loyal Detailed Commanding

↑ Incorrect: You should use each rating only once as in Example A ↑

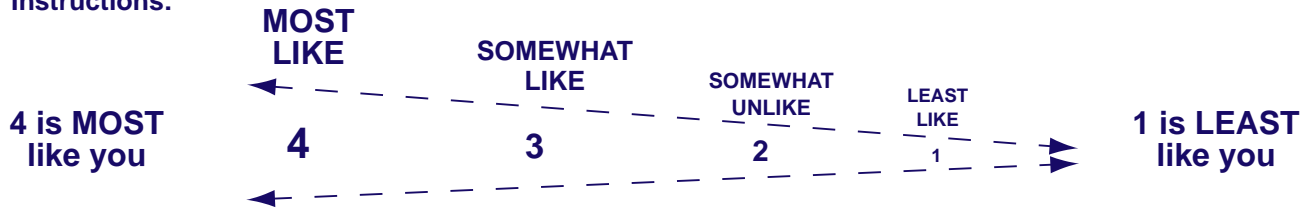
Name (print)

Company / Advisor

Reminder: Think of your core self and respond based upon your instinctive behavior, regardless of whether you consider it to be good or bad.

Caution: We all have ideas about how we would like to act in order to be more acceptable to others. However, that is not what we are looking for in this survey.

Instructions:



On each horizontal line, rate each word. Use all ratings (4, 3, 2, 1) and use each rating only once.

1	<input type="checkbox"/>	Enthusiastic	<input type="checkbox"/>	Loyal	<input type="checkbox"/>	Detailed	<input type="checkbox"/>	Commanding
2	<input type="checkbox"/>	Lenient	<input type="checkbox"/>	Expressive	<input type="checkbox"/>	Decisive	<input type="checkbox"/>	Particular
Reminder: 4 is MOST like you and 1 is LEAST like you!								
3	<input type="checkbox"/>	Convincing	<input type="checkbox"/>	Tough-minded	<input type="checkbox"/>	Meticulous	<input type="checkbox"/>	Kind
4	<input type="checkbox"/>	Independent	<input type="checkbox"/>	Follows rules	<input type="checkbox"/>	Peaceful	<input type="checkbox"/>	Fun-loving
5	<input type="checkbox"/>	High standards	<input type="checkbox"/>	Understanding	<input type="checkbox"/>	People-oriented	<input type="checkbox"/>	Daring
6	<input type="checkbox"/>	Charitable	<input type="checkbox"/>	Lively	<input type="checkbox"/>	Risk taker	<input type="checkbox"/>	Serious
7	<input type="checkbox"/>	Cheerful	<input type="checkbox"/>	Courageous	<input type="checkbox"/>	Precise	<input type="checkbox"/>	Merciful
8	<input type="checkbox"/>	Confident	<input type="checkbox"/>	Logical	<input type="checkbox"/>	Supportive	<input type="checkbox"/>	Inspiring
9	<input type="checkbox"/>	Conscientious	<input type="checkbox"/>	Patient	<input type="checkbox"/>	Good mixer	<input type="checkbox"/>	Fearless
10	<input type="checkbox"/>	Non-conforming	<input type="checkbox"/>	Talkative	<input type="checkbox"/>	Gentle	<input type="checkbox"/>	Analytical
11	<input type="checkbox"/>	Organized	<input type="checkbox"/>	Assertive	<input type="checkbox"/>	Popular	<input type="checkbox"/>	Even-paced
12	<input type="checkbox"/>	Good listener	<input type="checkbox"/>	Factual	<input type="checkbox"/>	Take-charge	<input type="checkbox"/>	Uninhibited
13	<input type="checkbox"/>	Aggressive	<input type="checkbox"/>	Cooperative	<input type="checkbox"/>	Vibrant	<input type="checkbox"/>	Accurate
14	<input type="checkbox"/>	Efficient	<input type="checkbox"/>	Direct	<input type="checkbox"/>	Gracious	<input type="checkbox"/>	Excitable
15	<input type="checkbox"/>	Influencing	<input type="checkbox"/>	Accommodating	<input type="checkbox"/>	Focused	<input type="checkbox"/>	Frank
16	<input type="checkbox"/>	Agreeable	<input type="checkbox"/>	Animated	<input type="checkbox"/>	Forceful	<input type="checkbox"/>	Systematic

Glossary

Accommodating	Responsive or helpful to others, obliging; adaptable
Accurate	Free from error, wants to be correct, conforms to fact
Aggressive	Bold, assertive, enterprising
Agreeable	Pleasant and pleasing to others; suitable, conforming
Analytical	Given to careful, methodical examination, studious, logical
Animated	Lively, vigorous, energetic, zestful
Assertive	States one's position boldly, confident, self-assured
Charitable	Generously gives to the needs of others, lenient, concerned with others
Cheerful	Happy, pleasant, merry, willing in disposition
Commanding	Directs others with authority; exercises dominating influence
Confident	Full of assurance and certainty, bold, self-assured
Conscientious	Thorough, painstakingly careful, principled
Convincing	Believable, plausible, able to be persuasive
Cooperative	Works well with others, compliant, willing
Courageous	Faces danger with confidence, brave, valiant
Daring	Adventurous, bold, willing to take risks
Decisive	Conclusive, firm; comfortable in decision making or problem solving
Detailed	Particular, meticulous, pays careful attention
Direct	Candid, frank, straightforward
Efficient	Works with a minimum of wasted or unnecessary effort
Enthusiastic	Energetic, eager or zealous
Even-paced	Steady, consistent, balanced
Excitable	Capable of being easily excited, aroused or stirred up
Expressive	Easily communicates thoughts, feelings, ideas or moods
Factual	Relies on facts rather than rumor or innuendo, realistic
Fearless	Bold, unafraid, brave
Focused	Able to concentrate attention, not easily distracted, able to direct toward a purpose
Follows rules	Likes to follow established procedure, instructions or guidelines
Forceful	Pushy, direct or strongly persuasive
Frank	Candid, straightforward, direct, open, sincere
Fun-loving	Playful, amusing, enjoys jokes, pleasure, amusement
Gentle	Kind, patient, amiable, tender

Glossary

Good listener	Pays careful attention to what is said, makes effort to listen well
Good mixer	Sociable, interacts easily with people, outgoing
Gracious	Kind, courteous, compassionate, warm
High standards	Insists on excellence, high quality, or precision
Independent	Self-reliant, prefers to operate free from influence and control of others
Influencing	Can cause others to change their minds, able to sway course of other's actions
Inspiring	Stimulates the mind, actions or emotions of others; arousing
Kind	Friendly, generous and warm-hearted
Lenient	Merciful or generous; not strict or harsh
Lively	Energetic, vigorous, full of life and spirit
Logical	Prefers to use clear reasoning, analytical, rational
Loyal	Faithful, dependable or steadfast
Merciful	Full of compassion, kind, forgiving
Meticulous	Extremely careful and precise, concerned with details
Non-conforming	Resists rules, beliefs, bounds or customs of others
Organized	Orderly, systematic, structured
Particular	Concerned with and attentive to details; meticulous
Patient	Capable of calmly enduring; tolerant, understanding
Peaceful	Calm, tranquil, free from hostility
People-oriented	Likes to interact with different people; social, outgoing
Popular	Widely liked and appreciated or sought after for company
Precise	Likes to be exact, definite, accurate or correct
Risk taker	Daring, willing to take chances, open to uncertainty
Serious	Sober, grave, earnest, concerned
Supportive	Furnishes assistance with practical needs; aids in the causes and interests of others
Systematic	Methodical, purposeful, orderly, procedure-oriented
Take-charge	Assumes responsibility, command or control
Talkative	Inclined to talk frequently; verbal
Tough-minded	Determined, not easily swayed, realistic
Understanding	Tolerant, accepting, responsive to thoughts and feelings of others
Uninhibited	Open, free from traditional constraints, unrestrained
Vibrant	High energy or activity, vigorous, lively, vital



Instructions for Financial DNA[®] Path 6 Profile

Purpose

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As You Choose...

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- Work quickly. Avoid agonizing over your choices.
- Your INITIAL CHOICE or reaction usually will be the best choice.

Directions

1. From each group of three words, indicate the one word that is **MOST** like you by marking an "X" in the box next to that word under the heading "**MOST**".
2. Then indicate the one word that is **LEAST** like you by marking an "X" in the box next to that word under the heading "**LEAST**".
3. **REMEMBER:** In each 3-word group you should select only one **MOST**, one **LEAST** and leave one word not marked.
4. Be sure to mark your **MOST** and **LEAST** choices clearly and complete all 3-word groups.
5. Study the examples below before starting:

Correct

Most		Least
<input checked="" type="checkbox"/>	Good listener	<input type="checkbox"/>
<input type="checkbox"/>	Consistent	<input type="checkbox"/>
<input type="checkbox"/>	Brave	<input checked="" type="checkbox"/>

Incorrect

Most		Least
<input checked="" type="checkbox"/>	Good listener	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Consistent	<input type="checkbox"/>
<input type="checkbox"/>	Brave	<input checked="" type="checkbox"/>



Name (print) _____

Company / Advisor _____

Reminder: Think of your core self and respond based upon your instinctive behavior, regardless of whether you consider it to be good or bad. **Caution:** We all have ideas about how we would like to act in order to be more acceptable to others. However, that is not what we are looking for in this survey. **Instructions:** Be sure to mark with an "X" your MOST and LEAST choices in each 3-word group, leaving one word totally blank in each group.

1	2	3	4																																																
<table border="1"> <tr><td>Most</td><td></td><td>Least</td></tr> <tr><td><input type="checkbox"/></td><td>Good listener</td><td><input type="checkbox"/></td></tr> <tr><td><input type="checkbox"/></td><td>Consistent</td><td><input type="checkbox"/></td></tr> <tr><td><input type="checkbox"/></td><td>Brave</td><td><input type="checkbox"/></td></tr> </table>	Most		Least	<input type="checkbox"/>	Good listener	<input type="checkbox"/>	<input type="checkbox"/>	Consistent	<input type="checkbox"/>	<input type="checkbox"/>	Brave	<input type="checkbox"/>	<table border="1"> <tr><td>Most</td><td></td><td>Least</td></tr> <tr><td><input type="checkbox"/></td><td>Independent</td><td><input type="checkbox"/></td></tr> <tr><td><input type="checkbox"/></td><td>Reassuring</td><td><input type="checkbox"/></td></tr> <tr><td><input type="checkbox"/></td><td>Thorough</td><td><input type="checkbox"/></td></tr> </table>	Most		Least	<input type="checkbox"/>	Independent	<input type="checkbox"/>	<input type="checkbox"/>	Reassuring	<input type="checkbox"/>	<input type="checkbox"/>	Thorough	<input type="checkbox"/>	<table border="1"> <tr><td>Most</td><td></td><td>Least</td></tr> <tr><td><input type="checkbox"/></td><td>Determined</td><td><input type="checkbox"/></td></tr> <tr><td><input type="checkbox"/></td><td>Entertaining</td><td><input type="checkbox"/></td></tr> <tr><td><input type="checkbox"/></td><td>Original</td><td><input type="checkbox"/></td></tr> </table>	Most		Least	<input type="checkbox"/>	Determined	<input type="checkbox"/>	<input type="checkbox"/>	Entertaining	<input type="checkbox"/>	<input type="checkbox"/>	Original	<input type="checkbox"/>	<table border="1"> <tr><td>Most</td><td></td><td>Least</td></tr> <tr><td><input type="checkbox"/></td><td>Commanding</td><td><input type="checkbox"/></td></tr> <tr><td><input type="checkbox"/></td><td>Clever</td><td><input type="checkbox"/></td></tr> <tr><td><input type="checkbox"/></td><td>Precise</td><td><input type="checkbox"/></td></tr> </table>	Most		Least	<input type="checkbox"/>	Commanding	<input type="checkbox"/>	<input type="checkbox"/>	Clever	<input type="checkbox"/>	<input type="checkbox"/>	Precise	<input type="checkbox"/>
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Reminder: One word will NOT be selected in each group.

Glossary

Accepting	Tolerant, forbearing, easygoing
Accommodating	Responsive or helpful to others, obliging, adaptable
Accurate	Free from error, wants to be correct, conforms to standards
Achieving	Persistent in accomplishing goals, eager to reach objectives
Action-oriented	Prefers action to status quo
Adventurous	Tends to undertake new and daring enterprises, seeks out risks
Affectionate	Has or shows fond feelings or affection, caring, tender
Agreeable	Pleasant and pleasing to others, suitable, conforming
Ambitious	Aspiring, driven, achieving, sets high goals
Artistic	Creative, stylish, appreciative of or sensitive to art or beauty
Assertive	State's one's position boldly, confidently, and with self assurance
Authoritative	Wields authority, commands, dominates
Bold	Fearless before danger; assured, confident
Blunt	Forthright, candid, frank
Brave	Courageous, gallant, dauntless
Brilliant	Intelligent, ingenious, insightful
Caring	Concerned about others, sympathetic, affectionate
Clever	Intelligent, quick-witted, original
Commanding	Directs others with authority, exercises dominating influence, gives orders
Compassionate	Kind, empathetic, sympathetic
Competitive	Likes or inclined to compete, driven
Confident	Full of assurance and certainty, bold, self-assured
Consistent	Steady, uniform, reliable
Convincing	Believable, plausible, able to persuade others
Courageous	Faces danger with confidence, brave, valiant
Creative	Inventive, imaginative, characterized by originality and expressiveness
Daring	Adventurous, bold, willing to take risks
Decisive	Conclusive, firm, comfortable in decision making or problem solving
Detailed	Particular, meticulous, pays careful attention
Determined	Resolute, marked by determination
Direct	Candid, frank, straightforward
Dominant	Assertive, exercises influence or control, influences through strength
Driving	Vigorous, determined, active
Efficient	Works with a minimum of wasted or unnecessary effort, highly productive
Eloquent	Able to express oneself forcefully and persuasively
Encouraging	Supportive, provides others with hope, courage, or confidence
Energetic	Has a lot of energy, vigorous
Enterprising	Has an independent, energetic spirit

Glossary

Entertaining	Captivating, interesting, amusing
Enthusiastic	Energetic, eager, zealous
Exact	Accurate, precise, meticulous
Exploring	Investigative, curious about new places or things
Extroverted	Outgoing, friendly, sociable
Factual	Relies on facts rather than rumor or innuendo, realistic
Fearless	Bold, unafraid, brave
Forceful	Pushy, direct or strongly persuasive
Frank	Candid, straightforward, direct, open, sincere
Fun-loving	Playful, amusing; enjoys jokes, pleasure, amusement
Goal-oriented	Purposeful; sets and meets goals, works toward objectives
Good listener	Pays careful attention to what is said; makes effort to listen well
Good mixer	Sociable, interacts easily with people, outgoing
Gracious	Kind, courteous, compassionate, warm
Gutsy	Courageous, daring, uninhibited
Harmonious	Agreeable, friendly, strives to get along with others
Imaginative	Inventive, innovative, creative, characterized by a lively imagination
Independent	Self-reliant; prefers to operate free from influence and control of others
Individualistic	Independent, non-conformist, asserts individuality through independence of thought & action
Influencing	Can cause others to change their minds, able to sway course of others' actions
Ingenious	Bright, displays skill in creating or designing, brilliant
Innovative	Original, imaginative, creative
Inspiring	Stimulates the mind, actions, or emotions of others
Intellectual	Intelligent, relies on thoughts and intellect rather than feelings or emotions
Interactive	Sociable; interacts easily with others, seeks communication
Intuitive	Has sharp insight
Inventive	Creative, innovative, skilful at inventing
Loud	Boisterous, noisy, talkative
Merciful	Full of compassion, kind, forgiving
Methodical	Systematic, orderly, well-organized, characterized by regular habits or behavior
Opportunistic	Taking advantage of opportunities, regardless of consequences
Orderly	Methodical, neat, tidy
Organized	Orderly, systematic, structured
Original	Unique, creative, adept at generating new things or ideas
Outgoing	Friendly, sociable, enjoys interacting with others
Peaceful	Calm, tranquil, free from hostility or conflict
People-oriented	Likes to interact with different people, social, outgoing
Perfectionist	Insists on extremely high standards; very thorough and careful, seeks perfection

Glossary

Persuasive	Convincing, influential
Pioneering	Innovative, trailblazing
Playful	Mischievous, merry, full of fun
Pleasant	Personable, agreeable, gracious
Practical	Sensible, down-to-earth, level-headed
Precise	Likes to be exact, definite, accurate or correct
Prepared	Wants to be equipped in advance, organized, ready to go
Productive	Efficient, effective, industrious
Quick-minded	Intelligent, mentally alert and sharp
Quiet	Subdued, restrained, calm
Reassuring	Comforting; able to restore confidence, provides assurance
Reserved	Undemonstrative, self-restrained not overly expressive in thought or feeling
Resourceful	Able to devise ways and means of handling difficult situations
Restrained	Keeps thoughts and feelings to oneself; reserved, controlled
Risk taker	Daring, willing to take chances, open to uncertainty
Scheduled	Organized, sets and makes plans
Self-reliant	Independent; reliant on one's own capabilities, judgements and resourcefulness
Self-sufficient	Needs little help from others, independent
Sensitive	Perceptive of the feelings or circumstances of others; sympathetic, responsive
Sociable	Friendly, outgoing, affable
Spirited	Lively, energetic, animated
Spontaneous	Impulsive
Stimulating	Lively, animated, encourages activity
Structured	Highly organized, following plans and/or rules
Supporting	Furnishes assistance with practical needs, aids in the causes and interests of others
Sympathetic	Compassionate, sensitive; responsive to thoughts and feelings of others
Take-charge	Assumes responsibility, command or control
Talkative	Inclined to talk frequently, chatty
Thinker	Devotes time to thought; intellectual, cerebral, one who reasons
Thorough	Likes to be careful, exacting and accurate
Tolerant	Patient; understanding of others and situations
Understanding	Tolerant, accepting, responsive to thoughts and feelings of others
Upbeat	Cheerful, optimistic
Venturesome	Daring, adventuresome; tending to bring on risk or danger
Verbal	Communicates well through speech, likes to talk
Vibrant	Lively, energetic, animated; high in energy or activity
Vigorous	Dynamic, energetic, exhibits energy
Warm-hearted	Friendly, gracious, kind, affectionate, generous