



Instructions for Financial DNA® Natural Behavior Discovery Process

Purpose:

The Financial DNA® Natural Behavior Discovery Process gives detailed insight into the natural behaviors, goals and motivations of an individual in relation to their life, financial and business decision making.

Directions:

- This is an assessment, not a test. Therefore, there are no right or wrong answers.
- **When you take this assessment your focus should be on your natural instinctive behavioral traits regardless of whether you consider them to be good or bad.**
- The focus should be on “who you are” and not on “who you want to be” or “who you believe you have become” in specific life, workplace, family, community or financial settings.
- The key to an accurate assessment is YOUR willingness to be realistic about your natural behavior.
- Work quickly by yourself without help from others. Avoid agonizing over your choices.

Example:

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 the word under the heading "LEAST".
3. REMEMBER: In each 3-word group you should select only one MOST, one LEAST and leave one word unmarked.
4. Be sure to mark your MOST and LEAST choices clearly and complete all 3-word groups.
5. Study the examples below before starting:

Incorrect

Correct

Name (print)

Phone

Company/Advisor

Email

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 e-word group, leaving one word totally blank in each group.

Most	Q1	Least
<input type="checkbox"/>	Provides support	<input type="checkbox"/>
<input type="checkbox"/>	Consistent approach	<input type="checkbox"/>
<input type="checkbox"/>	Aspiring	<input type="checkbox"/>

Most	Q2	Least
<input type="checkbox"/>	Expresses optimism	<input type="checkbox"/>
<input type="checkbox"/>	Self-reliant	<input type="checkbox"/>
<input type="checkbox"/>	Lively imagination	<input type="checkbox"/>

Most	Q3	Least
<input type="checkbox"/>	Confidently faces danger	<input type="checkbox"/>
<input type="checkbox"/>	Interactive	<input type="checkbox"/>
<input type="checkbox"/>	Self-assured	<input type="checkbox"/>

Most	Q4	Least
<input type="checkbox"/>	Attentive	<input type="checkbox"/>
<input type="checkbox"/>	Thinks quickly	<input type="checkbox"/>
<input type="checkbox"/>	Follows routines	<input type="checkbox"/>

Most	Q5	Least
<input type="checkbox"/>	Solution driven	<input type="checkbox"/>
<input type="checkbox"/>	Accurate	<input type="checkbox"/>
<input type="checkbox"/>	Excitable	<input type="checkbox"/>

Most	Q6	Least
<input type="checkbox"/>	Influencing	<input type="checkbox"/>
<input type="checkbox"/>	Brave	<input type="checkbox"/>
<input type="checkbox"/>	Concerned	<input type="checkbox"/>

Most	Q7	Least
<input type="checkbox"/>	Decision Maker	<input type="checkbox"/>
<input type="checkbox"/>	Generates new ideas	<input type="checkbox"/>
<input type="checkbox"/>	Determined	<input type="checkbox"/>

Most	Q8	Least
<input type="checkbox"/>	Prepares in advance	<input type="checkbox"/>
<input type="checkbox"/>	Outgoing	<input type="checkbox"/>
<input type="checkbox"/>	Concerned for others	<input type="checkbox"/>

Most	Q9	Least
<input type="checkbox"/>	Outspoken	<input type="checkbox"/>
<input type="checkbox"/>	Sees others' viewpoint	<input type="checkbox"/>
<input type="checkbox"/>	Exerts will	<input type="checkbox"/>

Most	Q10	Least
<input type="checkbox"/>	Well organized	<input type="checkbox"/>
<input type="checkbox"/>	Moves boldly	<input type="checkbox"/>
<input type="checkbox"/>	Resourceful	<input type="checkbox"/>

Most	Q11	Least
<input type="checkbox"/>	Non-conforming	<input type="checkbox"/>
<input type="checkbox"/>	Provides assurance	<input type="checkbox"/>
<input type="checkbox"/>	Seeks perfection	<input type="checkbox"/>

Most	Q12	Least
<input type="checkbox"/>	People orientated	<input type="checkbox"/>
<input type="checkbox"/>	Highly curious	<input type="checkbox"/>
<input type="checkbox"/>	Seeks adventure	<input type="checkbox"/>

Most	Q13	Least
<input type="checkbox"/>	Good at meeting people	<input type="checkbox"/>
<input type="checkbox"/>	Acts independently	<input type="checkbox"/>
<input type="checkbox"/>	Demonstrates originality	<input type="checkbox"/>

Most	Q14	Least
<input type="checkbox"/>	Friendly to others	<input type="checkbox"/>
<input type="checkbox"/>	Accepts new challenges	<input type="checkbox"/>
<input type="checkbox"/>	Orderly	<input type="checkbox"/>

Most	Q15	Least
<input type="checkbox"/>	Enjoys competing	<input type="checkbox"/>
<input type="checkbox"/>	Lively nature	<input type="checkbox"/>
<input type="checkbox"/>	Highly productive	<input type="checkbox"/>

Most	Q16	Least
<input type="checkbox"/>	Straightforward communicator	<input type="checkbox"/>
<input type="checkbox"/>	Develops new methods	<input type="checkbox"/>
<input type="checkbox"/>	Courteous	<input type="checkbox"/>

Most	Q17	Least
<input type="checkbox"/>	Self-willed	<input type="checkbox"/>
<input type="checkbox"/>	Friendly nature	<input type="checkbox"/>
<input type="checkbox"/>	Connects well with others	<input type="checkbox"/>

Most	Q18	Least
<input type="checkbox"/>	Investigates new opportunities	<input type="checkbox"/>
<input type="checkbox"/>	Works efficiently	<input type="checkbox"/>
<input type="checkbox"/>	Operates intuitively	<input type="checkbox"/>

Most	Q19	Least
<input type="checkbox"/>	Ventures into new areas	<input type="checkbox"/>
<input type="checkbox"/>	Vibrant	<input type="checkbox"/>
<input type="checkbox"/>	Forthright	<input type="checkbox"/>

Most	Q20	Least
<input type="checkbox"/>	Tolerant	<input type="checkbox"/>
<input type="checkbox"/>	Intellectual	<input type="checkbox"/>
<input type="checkbox"/>	Needs facts	<input type="checkbox"/>

Most	Q21	Least
<input type="checkbox"/>	Structured	<input type="checkbox"/>
<input type="checkbox"/>	Amusing	<input type="checkbox"/>
<input type="checkbox"/>	Original	<input type="checkbox"/>

Most	Q22	Least
<input type="checkbox"/>	Sets the agenda	<input type="checkbox"/>
<input type="checkbox"/>	Networks	<input type="checkbox"/>
<input type="checkbox"/>	Idea orientated	<input type="checkbox"/>

Most	Q23	Least
<input type="checkbox"/>	Assumes control	<input type="checkbox"/>
<input type="checkbox"/>	Pioneering	<input type="checkbox"/>
<input type="checkbox"/>	Assists others	<input type="checkbox"/>

Most	Q24	Least
<input type="checkbox"/>	Self-sufficient	<input type="checkbox"/>
<input type="checkbox"/>	Likes stability	<input type="checkbox"/>
<input type="checkbox"/>	Lacks fear	<input type="checkbox"/>

Most	Q25	Least
<input type="checkbox"/>	Animated	<input type="checkbox"/>
<input type="checkbox"/>	Persistent	<input type="checkbox"/>
<input type="checkbox"/>	Encourages thinking	<input type="checkbox"/>

Most	Q26	Least
<input type="checkbox"/>	Seeks out risks	<input type="checkbox"/>
<input type="checkbox"/>	Intelligent	<input type="checkbox"/>
<input type="checkbox"/>	Empathetic	<input type="checkbox"/>

Most	Q27	Least
<input type="checkbox"/>	Imagines new possibilities	<input type="checkbox"/>
<input type="checkbox"/>	Sets big goals	<input type="checkbox"/>
<input type="checkbox"/>	Examines details	<input type="checkbox"/>

Most	Q28	Least
<input type="checkbox"/>	Direct	<input type="checkbox"/>
<input type="checkbox"/>	Full of fun	<input type="checkbox"/>
<input type="checkbox"/>	Process orientated	<input type="checkbox"/>

Most	Q29	Least
<input type="checkbox"/>	Talks frequently	<input type="checkbox"/>
<input type="checkbox"/>	Achieves goals	<input type="checkbox"/>
<input type="checkbox"/>	Influences others	<input type="checkbox"/>

Most	Q30	Least
<input type="checkbox"/>	Inventive	<input type="checkbox"/>
<input type="checkbox"/>	Forgiving	<input type="checkbox"/>
<input type="checkbox"/>	Ambitious	<input type="checkbox"/>

Most	Q31	Least
<input type="checkbox"/>	Agreeable	<input type="checkbox"/>
<input type="checkbox"/>	Pays attention to detail	<input type="checkbox"/>
<input type="checkbox"/>	Confident approach	<input type="checkbox"/>

Most	Q32	Least
<input type="checkbox"/>	Prefers working alone	<input type="checkbox"/>
<input type="checkbox"/>	Amiable manner	<input type="checkbox"/>
<input type="checkbox"/>	Growth driven	<input type="checkbox"/>

Most	Q33	Least
<input type="checkbox"/>	Accepts challenges	<input type="checkbox"/>
<input type="checkbox"/>	Engaging	<input type="checkbox"/>
<input type="checkbox"/>	Investigates new ideas	<input type="checkbox"/>

Most	Q34	Least
<input type="checkbox"/>	Leads others	<input type="checkbox"/>
<input type="checkbox"/>	Solves problems	<input type="checkbox"/>
<input type="checkbox"/>	Precise	<input type="checkbox"/>

Most	Q35	Least
<input type="checkbox"/>	Lenient	<input type="checkbox"/>
<input type="checkbox"/>	Expressive	<input type="checkbox"/>
<input type="checkbox"/>	Risk taker	<input type="checkbox"/>

Most	Q36	Least
<input type="checkbox"/>	Skillful in designing	<input type="checkbox"/>
<input type="checkbox"/>	Fits in with others	<input type="checkbox"/>
<input type="checkbox"/>	Daring	<input type="checkbox"/>

Most	Q37	Least
<input type="checkbox"/>	Energetic	<input type="checkbox"/>
<input type="checkbox"/>	Particular	<input type="checkbox"/>
<input type="checkbox"/>	Wields authority	<input type="checkbox"/>

Most	Q38	Least
<input type="checkbox"/>	Tolerates losses	<input type="checkbox"/>
<input type="checkbox"/>	Communicative	<input type="checkbox"/>
<input type="checkbox"/>	Diligent	<input type="checkbox"/>

Most	Q39	Least
<input type="checkbox"/>	Systematic	<input type="checkbox"/>
<input type="checkbox"/>	Maximizer	<input type="checkbox"/>
<input type="checkbox"/>	Insistent	<input type="checkbox"/>

Most	Q40	Least
<input type="checkbox"/>	Enjoys talking	<input type="checkbox"/>
<input type="checkbox"/>	Success driven	<input type="checkbox"/>
<input type="checkbox"/>	Sensitive to others	<input type="checkbox"/>

Most	Q41	Least
<input type="checkbox"/>	Opportunistic	<input type="checkbox"/>
<input type="checkbox"/>	Exercises strong influence	<input type="checkbox"/>
<input type="checkbox"/>	Sets and makes plans	<input type="checkbox"/>

Most	Q42	Least
<input type="checkbox"/>	Shows warm feelings	<input type="checkbox"/>
<input type="checkbox"/>	Appreciates style	<input type="checkbox"/>
<input type="checkbox"/>	Shows enthusiasm	<input type="checkbox"/>

Most	Q43	Least
<input type="checkbox"/>	Brilliant ideas	<input type="checkbox"/>
<input type="checkbox"/>	Conforming	<input type="checkbox"/>
<input type="checkbox"/>	Frank	<input type="checkbox"/>

Most	Q44	Least
<input type="checkbox"/>	Has high standards	<input type="checkbox"/>
<input type="checkbox"/>	Free speaking	<input type="checkbox"/>
<input type="checkbox"/>	Pushes forward	<input type="checkbox"/>

Most	Q45	Least
<input type="checkbox"/>	Follows through	<input type="checkbox"/>
<input type="checkbox"/>	Patient	<input type="checkbox"/>
<input type="checkbox"/>	Visionary	<input type="checkbox"/>

Most	Q46	Least
<input type="checkbox"/>	Candid	<input type="checkbox"/>
<input type="checkbox"/>	Comforting	<input type="checkbox"/>
<input type="checkbox"/>	Enjoys entertaining	<input type="checkbox"/>

Glossary

Question Number	Word/Phrase/Term	Definition
1	Provides support Consistent approach Aspiring	assists others, provides others with hope, courage, or confidence steady, uniform, reliable ambitious, driven, achieving, sets high goals
2	Expresses optimism Self-reliant Lively imagination	eager, hopeful, positive outlook, overly enthusiastic reliant on one's own capabilities, judgments and resourcefulness inventive, innovative, creative
3	Confidently faces danger Interactive Self-assured	bold, brave, valiant, fearless sociable, wants to interact with others, seeks communication full of assurance and certainty, bold, confident
4	Attentive Thinks quickly Follows routines	pays careful attention to what is said; makes effort to listen well intelligent, mentally alert and sharp likes habit, prefers to perform in a routine manner
5	Solution driven Accurate Excitable	looks to solve situations and gain results; able to devise means of handling situations free from error, wants to be correct, conforms to standards easily excited and energized
6	Influencing Brave Concerned	convincing, influential, persuasive courageous, gallant, dauntless shows concern for others, sympathetic, affectionate
7	Decision maker Generates new ideas Determined	conclusive, decisive, comfortable in decision making or problem solving inventive, imaginative, characterized by originality and expressiveness follows through on goals, focused on outcomes
8	Prepares in advance Outgoing Concerned for others	wants to be equipped in advance, organized, ready to go friendly, affable, energized by people kind, empathetic, sympathetic
9	Outspoken Sees others' viewpoint Exerts will	does not hesitate to talk or express views, speaks up tolerant, accepting, responsive to thoughts and feelings of others states one's positions boldly, confidently, and with self assurance
10	Well organized Moves boldly Resourceful	orderly, systematic, structured acts with self assurance, does not doubt self able to come up with new systems, inventive, enterprising
11	Non-conforming Provides assurance Seeks perfection	wants to be different, prefers to operate free from influence and control of others comforting, able to restore confidence, shows warmth likes to be careful, exacting and accurate
12	People orientated Highly curious Seeks adventure	likes to interact with different people, outgoing, networks very inquisitive, seeks information, wants to learn about new things tends to undertake new and daring enterprises, seeks out risks
13	Good at meeting people Acts independently Demonstrates originality	sociable, meets people easily, friendly asserts individuality through independence of thought & action imaginative, creative, unique, good at generating new ideas
14	Friendly to others Accepts new challenges Orderly	caring, gracious, kind, affectionate, generous faces difficult tasks with confidence methodical, neat, tidy

15	Enjoys competing Lively nature Highly productive	likes or inclined to compete, driven vigorous, dynamic, energetic, exhibits energy works with a minimum of wasted or unnecessary effort, efficient
16	Straightforward communicator Develops new methods Courteous	forthright, clear in speaking enterprising, resourceful, innovative, visionary kind, compassionate, warm
17	Self-willed Friendly nature Connects well with others	self-directing, controlling, does not look to others for input personable, pleasant, agreeable, gracious friendly, sociable, enjoys interacting with others
18	Investigates new opportunities Works efficiently Operates intuitively	investigative, curious about new places or things efficient, effective, industrious has sharp insight, intuitive
19	Ventures into new areas Vibrant Forthright	daring, adventuresome; tending to bring on risk or danger lively, energetic, animated, vigorous communicates directly and without evasion
20	Tolerant Intellectual Needs facts	patient, understanding of others, easygoing, accepting intelligent, relies on thoughts and intellect rather than feelings or emotions relies on facts rather than rumor or emotions, realistic
21	Structured Amusing Original	highly organized, procedural captivating, entertaining, creates a fun atmosphere unique, creative, adept at generating new things or ideas
22	Sets the agenda Networks Idea orientated	directing, commanding or controlling promotes and helps establish connections or relationships between people works with and expresses ideas as opposed to the established way
23	Assumes control Pioneering Assists others	assumes responsibility, commands, sets the agenda takes initiative, trailblazing, goal orientated furnishes assistance with practical needs, aids in the causes and interests of others
24	Self-sufficient Likes stability Lacks fear	needs little help from others, independent wants consistency, steadiness, balance bold, unafraid, fearless, brave
25	Animated Persistent Encourages thinking	vigorous, lively, expressive resolute, marked by determination stimulating, brainstorming, enjoys open discussions
26	Seeks out risks Intelligent Empathetic	tends to undertake new and daring enterprises, open to uncertainty clever, quick-thinking, original, intellectual compassionate, sensitive; responsive to thoughts and feelings of others
27	Imagines new possibilities Sets big goals Examines details	marked by independence and creativity in thought or action progressive, driven, ambitious shows attentiveness to all aspects or details; meticulous
28	Direct Full of fun Process orientated	candid, frank, open, sincere mischievous, merry, playful follows steps, policies and rules, consistent
29	Talks frequently Achieves goals Influences others	talkative, chatty, communicative persistent in accomplishing goals, eager to reach objectives can cause others to change their minds, able to sway course of others' actions
30	Inventive Forgiving Ambitious	creative, innovative, skillful at inventing full of compassion, kind, merciful aspiring, driven, achieving, sets high goals

31	Agreeable Pays attention to detail Confident approach	pleasant, friendly, strives to get along with others particular, meticulous, pays careful attention fearless before danger, assured, bold
32	Prefers working alone Amiable manner Growth driven	operates without others, makes decisions independently having pleasant, good-natured qualities seeking to expand and improve on current situations
33	Accepts challenges Engaging Investigates new ideas	courageous, daring, uninhibited outgoing, friendly, sociable, extroverted wants to explore new things and know more
34	Leads others Solves problems Precise	take charge, exercises dominating influence, gives orders places importance on generating solutions, resourceful accurate, meticulous, exact
35	Lenient Expressive Risk taker	patient; understanding of others and situations easily communicates thoughts, feelings, ideas or moods daring, willing to take chances, open to uncertainty
36	Skillful in designing Fits in with others Daring	original, creative, brilliant, ingenious responsive or helpful to others, obliging, adaptable adventurous, bold, willing to take risks
37	Energetic Particular Wields authority	possesses and displays energy, active likes to be specific, definite, accurate or correct authoritative, commands, dominates
38	Tolerates losses Communicative Diligent	accepts and rationalizes losses, withstands lack of security or guarantees talkative, conversational constant in effort to accomplish something; attentive and persistent in doing anything
39	Systematic Maximizer Insistent	structured, orderly, characterized by regular habits or behavior makes the greatest or fullest use of ideas and solutions emphatic, direct or strongly persuasive
40	Enjoys talking Success driven Sensitive to others	communicates well through speech, likes to talk likes or inclined to compete empathetic, sympathetic, responsive
41	Opportunistic Exercises strong influence Sets and makes plans	takes advantage of opportunities, regardless of consequences assertive, exercises control, influences through strength organized, orderly, systematic, structured
42	Shows warm feelings Appreciates style Shows enthusiasm	has or shows fond feelings or affection, caring, tender creative, stylish, appreciative of or sensitive to art or beauty demonstrative, promotes thoughts, upbeat
43	Brilliant ideas Conforming Frank	thinks in intelligent, ingenious, and insightful ways follows others, accommodates, fits in forthright, blunt, outspoken
44	Has high standards Free speaking Pushes forward	very thorough and careful, perfectionistic open with sharing thoughts driving, determined, active, goal orientated
45	Follows through Patient Visionary	continues a plan or project to its completion displays calmness, steady, content, tolerant, understanding audacious, speculative, able to envisage, idealistic, dreamer
46	Candid Comforting Enjoys entertaining	open, straightforward, truthful able to restore confidence, provides assurance enjoys and seeks out fun or excitement, has a playful attitude