



## Financial DNA<sup>®</sup> Core Life Motivations Profile

### Financial Planning Report for David Woo

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

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**Financial DNA<sup>®</sup> Financial Planning Report  
David Woo  
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## Introduction

The goal of this report is to provide specific behavioral insights into how you will naturally approach the financial planning process. For your advisor, spouse, partner and family this will provide more guidance on how to manage your expectations. This report should not be relied upon in isolation for making decisions.

## Core Financial Life Profile

We have prepared this Financial Planning Report based on your Core Financial Life Profile being the "Strategist" profile which is one of our 10 unique profiles.

*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 Financial Planning Approach as a Strategist Profile

1. Strategists are very visionary and enjoy setting goals, and then guiding the strategy to get there. They will tend to be quite independent in their approach and will not delegate to an advisor easily. In the advisory relationship they benefit more from quality guidance rather than having decisions imposed upon them.
2. They will be very rational in their planning approach with a strong focus on the bottom line, how their goals will be achieved, creating sustainable wealth and ensuring the costs are minimized.
3. Strategists will take risks but normally they will be very calculated and only venture into riskier opportunities after research is performed to minimize the exposure.
4. Strategists are able to respond well to communication that is clear, transparent, concise and accurate. Provide them with options and identify the risks so quick decisions can be made. When they want research material it's important for advisors and associates to have the research readily at hand.
5. Strategists need times of thoughtful introspection in order to analyze information, think of new strategies and to re-energize.

## Key Questions for You to Consider as a Strategist Profile

1. Are you keeping your advisors, spouse and family members fully abreast of your vision and where they fit in to it? How comfortable are you trusting others with key financial information and your real feelings and desires?
2. What factors are motivating the goals that you set? Are you developing an appropriate balance between the bottom-line results, your relationships with family members and friends, and recognizing your values?
3. Are you developing a more effective style of communication by showing patience and listening when others with different gifts sets to yours are offering an opinion on life and financial matters?

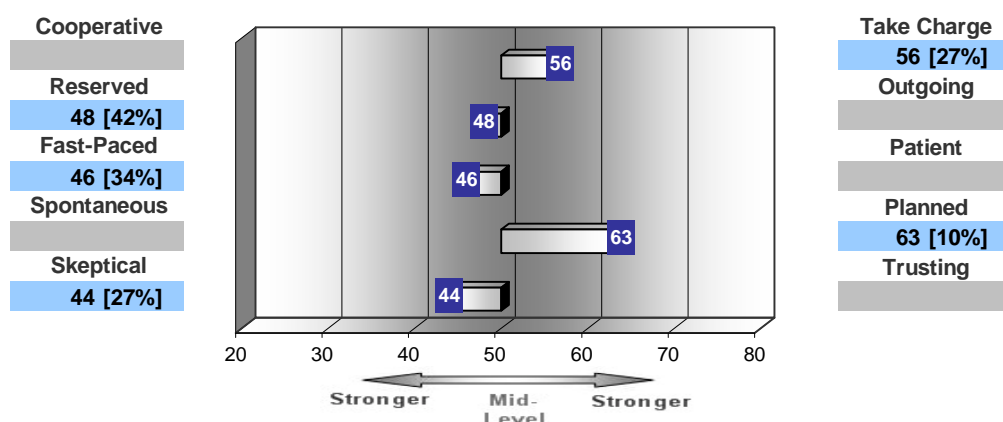
## Interpretation of this Report

In reviewing the report, please note the following points:

- The profile report reflects your natural behavior only. This behavior will generally remain consistent over time as it is the core of who you are. However, the report does not reflect how you may from time to time modify your behavior in certain situations based on experiences, education and values.
- The graph below shows your scores for each behavioral factor in a range of 20 (left side) to 80 (right side). The “percentage score” in the brackets next to each score refers to the percentage of people in the population who score like you on this factor. Therefore, for each behavioral factor the closer your score is to 20 or 80 the lower your percentage score. Scores closer to 50 indicate a more moderate style that is typically more flexible in that behavioral factor.
- **To the extent you have strong profile factors over 60 and under 40, there is a higher chance the behavioral insights in this report will be more intensively displayed when you are making life and financial decisions over a period of time. Based on your profile scores, your 2 strongest profile factors are:**
  - \* **Anchored** - Prefers proven methods, solution driven, focused on execution
  - \* **Pioneering** - Sets direction, ambitious, committed to goals

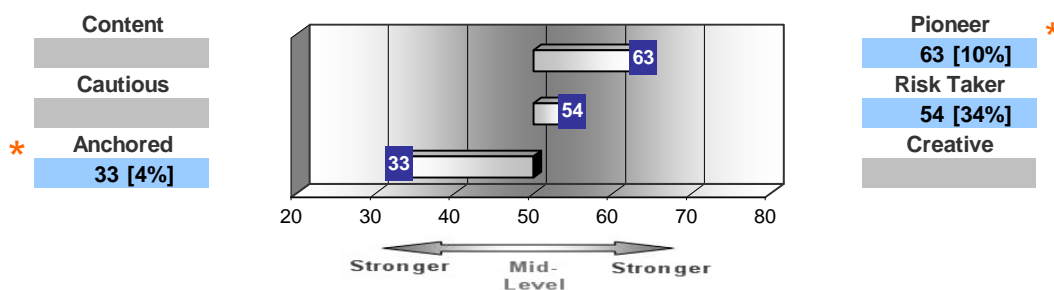
## Core Financial Life Drivers

The following 5 factors representing your Core Financial Life Drivers provide specific insights into your natural talents, strengths and struggles and how you communicate. Overall, these factors will indicate your natural desire to build relationships and also your motivations to getting results. If you have scores which are high on Take Charge, Fast-Paced, Planned and Skeptical you will be more result and task-focused. If you have scores which are high on Cooperative, Outgoing, Patient and Trusting you will be more relationship focused.



## Financial Life Planning Drivers

The following 3 factors representing your Financial Life Planning Drivers are also core to how you make life, financial and business decisions. However, these factors focus more specifically on your motivations for growth and/or balance in your life. If you have scores high on Pioneer, Risk Taker and Creative then this will indicate desires to maximize, set goals, take opportunities, innovate and to expand your horizons. If you have scores high on Content, Cautious and Anchored then you will be more interested in life balance and following tried and tested ways.



## 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 your profile graphs on page 3 of this report, your primary Quality Life Behavioral Attitudes are summarized in the table below.

	Core Life Attitude 1 <b>Anchored Factor</b>	Core Life Attitude 2 <b>Pioneering Factor</b>
<b>Communication</b>	Be practical	Provide big picture
<b>Quality Life Outlook</b>	Experiential	Being progressive
<b>Activity Passion</b>	Execution	Accepting challenges
<b>Life Values</b>	Consistency	Taking action
<b>Strength</b>	Implementer	Takes initiative
<b>Blind-spot</b>	Too fixed	Too focused
<b>Wealth Creation Philosophy</b>	Proven approach	Growth orientated
<b>Money Attitude</b>	Realistic	Driven
<b>Financial Goal Setting</b>	Tangible	Ambitious
<b>Planned Giving Motivation</b>	Established opportunities	Having high impact

## Financial Planning Insights

Based on combinations of the behavioral factors in your profile graph shown on page 3 of this report, your natural approach to financial planning is set out in the table below.

Financial Planning Insights	
Sets the Agenda:	<b>HIGH</b>
Relationships:	<b>LOW</b>
Results:	<b>HIGH</b>
Risk Propensity:	<b>MEDIUM</b>
Risk Tolerance:	<b>MEDIUM</b>
Setting Goals:	<b>HIGH</b>
Pursuing Goals:	<b>HIGH</b>
Comfort with Change:	<b>MEDIUM</b>
New Idea Driven:	<b>LOW</b>
Financially Organized:	<b>HIGH</b>
Need for Information:	<b>MEDIUM</b>
Spender:	<b>LOW</b>
Need for Control:	<b>HIGH</b>

## Your Relationship Management Summary

The Relationship Management Summary in the table below has been prepared based on your Strategist unique profile. This information is very powerful for self-coaching and also for others being more aware of who you are and how to adapt to you. The Unique Strengths are your primary talents which if used appropriately will help you in performing to your greatest potential, with the least stress. The Unique Struggles are behavioral traits which can arise from over using your unique strengths. We encourage you to use your strengths and manage your struggles such that they do not become weaknesses and get in the way of your maximum performance. Further, your advisor, spouse, partner, family and others in your life should be aware of these Strengths and Struggles when relating to you.

Your Unique Strengths		Your Unique Struggles
Initiating, wants to set the agenda	Operates well in conflict	May be controlling and not know it
Places high priority on achieving goals	Works at a fast pace	Underestimates work needed to achieve goals
Speaks directly	Analyzes before deciding	Sometimes too impatient
Sees the strategic/future potential	Conducts research to determine facts	Perfectionistic to avoid mistakes

Your Relationship Keys	
Remember my need for control	Use summaries, bullets, and key points
Give direct answers; get to the point	Anticipate my immediate responses and quick fixes
Move quickly to the bottom line	Honor my need for structure, schedules, rules
Offer options so I can decide	Look for ways to minimize the risks

The Relationship Keys indicate how you wish to be communicated with by others. If others communicate with you on these terms then an enhanced relationship can be developed and maintained with you.

## Disclaimer

The purpose of this instrument is educational. It is designed to help people identify their natural behavioral strengths. The Financial DNA Core Life Profile should not be used to identify, diagnose, or treat psychological, mental health, and/or medical problems. Additionally, if 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 Core Life Profile you expressly waive and relinquish any and all claims of any nature against Financial DNA Resources, 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.
- Your Wealth Mentoring Report will provide in-depth behavioral information to guide you in building your relationship with money and enhancing your quality life.
- For more information, please email us at [inquiries@financialdna.com](mailto:inquiries@financialdna.com).

## Next Steps

### 1. Financial Directions Profile

This profile is stage 2 of the Financial DNA Discovery Process and uncovers your learned financial behavior and decision. A key outcome of this stage of the process is the Financial DNA Behavior Analysis, which compares your natural behavior (i.e. from the Financial DNA Core Life Motivations profile) with your learned financial behavior, and this provides a more robust platform to establish your financial plan.

### 2. Quality Life Insights Profile

This profile is stage 3 of the Financial DNA Discovery Process and uncovers a number of your quality life drivers which in addition to your financial behaviors are foundational to your life purpose and setting your goals. The key areas uncovered are passion, vision, values, needs and wants and the environment in which you are in now and from which you have come.

### 3. Further Education

We have a number of education programs available for investors and financial advisors to enhance understanding of what the profiles mean and how to use them on a daily basis. Please contact us at [inquiries@financialdna.com](mailto:inquiries@financialdna.com) for more information and access to these programs.