



Financial DNA[®] Core Life Motivations Profile

Financial Planning Report for Frank Danielson

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

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Financial DNA[®] Financial Planning Report

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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 "Reflective Thinker" profile which is one of our 10 unique profiles.

Reflective Thinkers are analytical, logical, and philosophical in their search for meaning, truth and purpose in all they do. They are particularly adept at drawing incisive conclusions from data and research. Their accuracy and precision is valuable in any finance or advisory setting, and they bring objectivity to decision-making processes.

Your Financial Planning Approach as a Reflective Thinker Profile

1. A Reflective Thinker looks beyond the immediate questions raised. They quickly uncover fundamental issues and likely consequences in terms of the financial decision making process. They will endeavor to educate themselves well in all aspects of their finances in order to ensure they are on the same level as their advisors.
2. The approach of the Reflective Thinker to financial planning will be very structured and they will require a lot of information. They will only set goals that they know they can achieve. It will be important for them to see a well thought out structure so they can achieve their goals, otherwise they will quickly lose confidence. A key concern for the Reflective Thinker will be whether they have enough money.
3. A Reflective Thinker will be naturally cautious and will require investments which are quite predictable. Maintaining stability and order in their life is very important. If their spouse, partner or family member is a higher risk taker then measures need to be put in place for protection. They will not like surprises which upset their planned life.
4. By asking questions and exploring issues, the Reflective Thinkers contribution to debate can produce a wider range of ideas and solutions. In a family environment allowing this debate will add significant value to the decision making process as they can provide family or joint investors with precise, logical and well thought-out advice.
5. While they prefer a relaxed environment, Reflective Thinkers are inclined to ask more probing questions which may make advisors feel uncomfortable. Nevertheless this ability to probe and uncover information is a vital key to successful structured yet growth orientated financial planning. Joint investors and family members should, therefore, encourage Reflective Thinkers to take this role on their behalf when discussing finances.

Key Questions for You to Consider as a Reflective Thinker Profile

1. Explain that while you are open to accepting challenges this needs to be set against a background of detail to the point of needing minutia in order to make sound financial decisions. How much money is enough? To what degree do you get stuck worrying about this?
2. List occasions where your reflective style of behavior might have been used more effectively? Would you have needed to moderate your behavior to the environment you were in? What would you have done differently? How was your contribution to the debate received? As a result of your need for detail, was an investment opportunity lost? How might you have proceeded differently (with the benefit of hindsight)?
3. Think about how you might react when surrounded by advisors or family members you consider to be 'shallow thinkers'. What steps would you take to ensure your contribution to the debate was listened to and valued? How might you feel if thoughts and ideas you presented were rejected? Consider how your co-investors or family members might react to your need for detailed analyses.

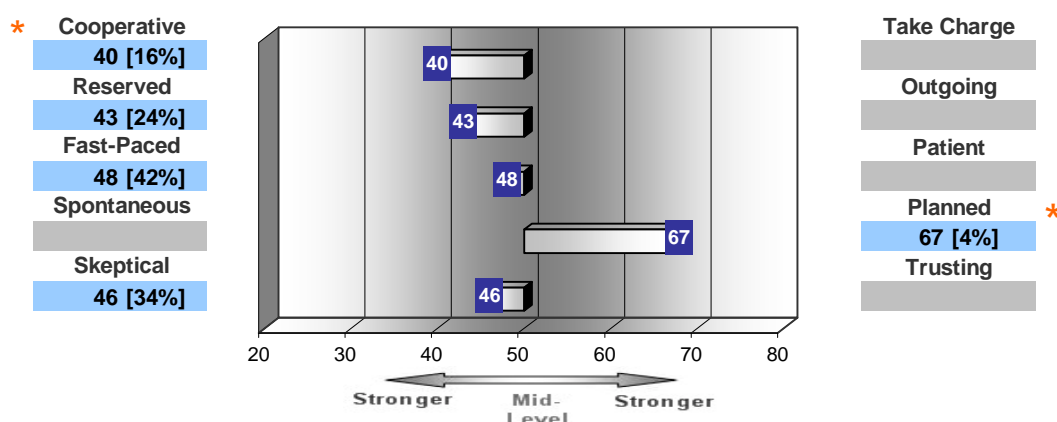
Interpretation of this Report

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:**
 - * **Planned** - Structured, task focused, analytical in approach
 - * **Cooperative** - Cooperative, flexible in approach, fits in well

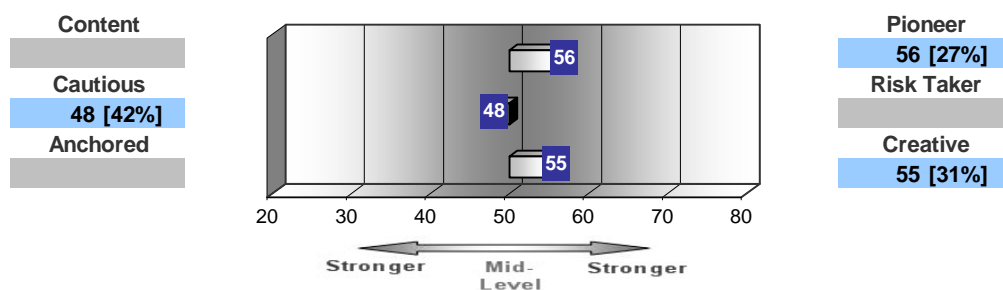
Core Financial Life Drivers

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 Planned Factor	Core Life Attitude 2 Cooperative Factor
Communication	Give information	Draw out
Quality Life Outlook	Persistence	Passive
Activity Passion	Research	Team work
Life Values	Reliability	Fitting in
Strength	Analytical	Cooperative
Blind-spot	Fear of shortage	Too hesitant
Wealth Creation Philosophy	Structured	Practical
Money Attitude	Save it	Cautious
Financial Goal Setting	Rational	Achievable
Planned Giving Motivation	Transparency	Local giving

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:	MEDIUM
Relationships:	MEDIUM
Results:	MEDIUM
Risk Propensity:	MEDIUM
Risk Tolerance:	MEDIUM
Setting Goals:	MEDIUM
Pursuing Goals:	HIGH
Comfort with Change:	LOW
New Idea Driven:	MEDIUM
Financially Organized:	HIGH
Need for Information:	HIGH
Spender:	LOW
Need for Control:	LOW

Your Relationship Management Summary

The Relationship Management Summary in the table below has been prepared based on your Reflective Thinker 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
Speaks tactfully	Organized and scheduled	May be hesitant to offer opinions
Cooperative - promotes stability	Accurate with details	Tends to underestimate self
Moves cautiously into new areas	Analyzes before deciding	Perfectionistic to avoid mistakes
Focused - likes to do one thing at a time	Conducts research to determine facts	May focus on details and miss the bigger picture

Your Relationship Keys	
Create a relaxed environment	Consider my need for accuracy and detail
Encourage my input	Present specifics - facts, figures, data
Be an active listener	Honor my need for structure, schedules, rules
Remember to focus on the practical	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.

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 for more information and access to these programs.