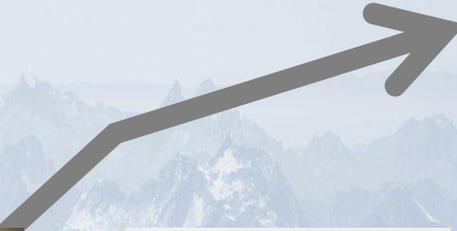


FINANCIAL PERSONALITY MANAGEMENT WORKSHOP TRAINING



Research shows that 93.6% of the financial planning process is behavioral management of the client. In the new highly competitive world of financial planning advisors need to become behaviorally smart for enhancing client relationships and increasing their value.

As an advisor, learn how you can discover predictable behavioral insights about your clients' financial personality to help them manage the investment, financial and relationship risks that will potentially have a significant impact on their financial planning. These insights will help you to put who the client is at the center of the financial planning process.

Research and experience show with this approach you can grow your business by 23% per year and increase productivity by up to 40%.



**How are you navigating
the different behavioral styles
and emotions of your clients?**



If you are motivated to become “behaviorally smart” by:

- Gaining accurate and reliable behavioral insights for knowing who your clients are
- Identifying all of the behavioral success factors and risks that will influence a client achieving their goals
- Openly communicating on the clients terms to increase emotional engagement
- Growing client relationships for life
- Matching your ideal client to the right advisory team
- Reducing decision biases by tailoring financial plans with behavioral insights
- Aligning client risk taking and behavioral biases to product suitability for compliance
- Mitigating your own biases in providing advice

...then join us for the **“Financial Personality Management”** Workshop Training.

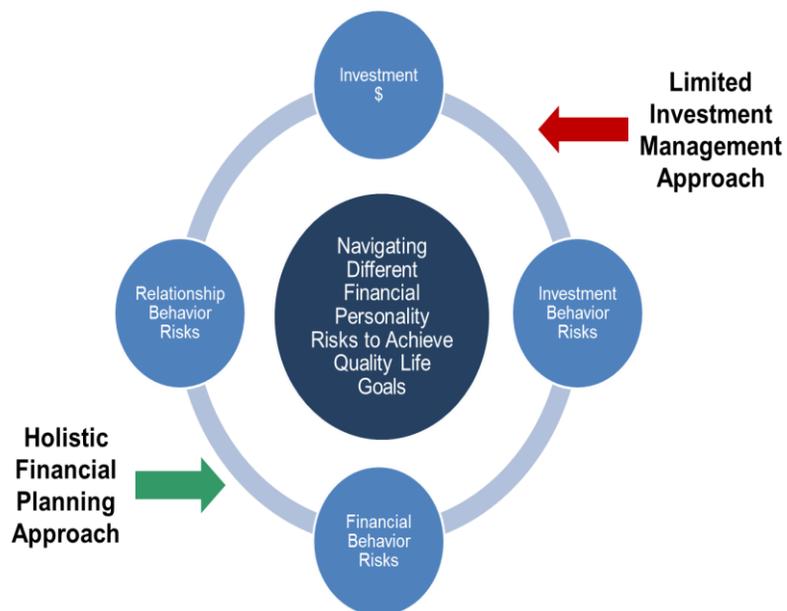
ABOUT THE WORKSHOP TRAINING

The traditional approach to risk discovery using situational questions is outdated. The new paradigm is holistic financial personality discovery using the most reliable psychometric assessment systems based on the Forced Choice Assessment Model.

This is a practical and experiential training program which includes advisors learning to:

- Understand and manage their own Financial DNA “wiring” through greater awareness of the behavioral biases they have in serving clients.
- Position their service for engaging a client to complete Financial DNA up-front in the advisory process.
- Interpret the reports and effectively use the resulting behavioral insights in client meetings to deepen engagement.
- Conclude and document the financial planning process by aligning financial personality to goals and financial capacity.
- Identifying your ideal clients and keeping them engaged

Financial DNA Meets the Behavioral Challenge



This is what participants are saying:

“The program gave me powerful processes that I can use to gain deeper insights into how different clients make financial decisions and also enable me to build deeper relationships.”

“This program brings behavioral finance to life in a practical way that will have many lasting benefits for my clients and differentiate my practice.”

To book a half day (4 hour) experiential training workshop, contact our office at 1-866-791-8992 or send an email to inquiries@dnabehavior.com

Visit the Financial DNA Website at www.financialdna.com