

Certified Financial DNA® Wealth Mentor Training

Learn to know, engage and grow your clients for building a client-centered business.



Guide Your Clients through Validated Financial DNA Discovery Processes to uncover their Financial Personality, Communication Style and Quality Life Drivers.

The Program Details

Who Should Attend the Certified Financial DNA Wealth Mentor Training Program:

Those who will receive the greatest benefit from this program will be:

- Financial advisors, accountants, attorney's, consultants, mentors, coaches and trainers with established businesses who believe "behavior drives performance" and are seeking a structured process to know, engage and grow their clients to provide customized life long experiences for sustainable Financial Planning Performance.
- Any other person seeking to transform personal and business performance for themselves and others.

Financial DNA Wealth Mentor Training Structure:

- Pre-course work consisting of the participant completing the natural behavior and learned behavior Financial DNA Discovery Processes and 5 of their clients or team members completing their discovery
- Classroom training for 2 consecutive days from 8.00am to 5.00pm on Natural and Learned Behavior
- 3 Webinars for 1.5hours each post the classroom training
- Access to Wealth Mentor Learning Center
- Completing the two day training does not qualify for certification, to become DNA certified you must complete the certification program (see below)

Financial DNA Wealth Mentor Certification Program (after the 2 day course described above):

- Follow up 1:1 Coaching Call to work through case study client debriefs
- Classroom training for 2 consecutive days from 8:00am to 5:00pm on Quality Life, Family Succession planning
- Follow up 1:1 Coaching Call coaching call to work through case study debriefs
- DNA Certification and designation as a Certified Wealth Mentor

Location of Classroom Training: Atlanta, GA

What you get:

The training program includes a training handbook, complimentary DNA Behavior Discovery for the participant and 5 clients, team members or associates before the training, and access to the Certified Wealth Mentor Community Resources for using and delivering DNA Financial Planning Performance Solutions.

Transportation, hotel and meals outside the training will be at your own expense. A list of local hotel, restaurants and transportation recommendations will be provided upon registration.

For Registration Procedures or More Information : email inquiries@dnabehavior.com

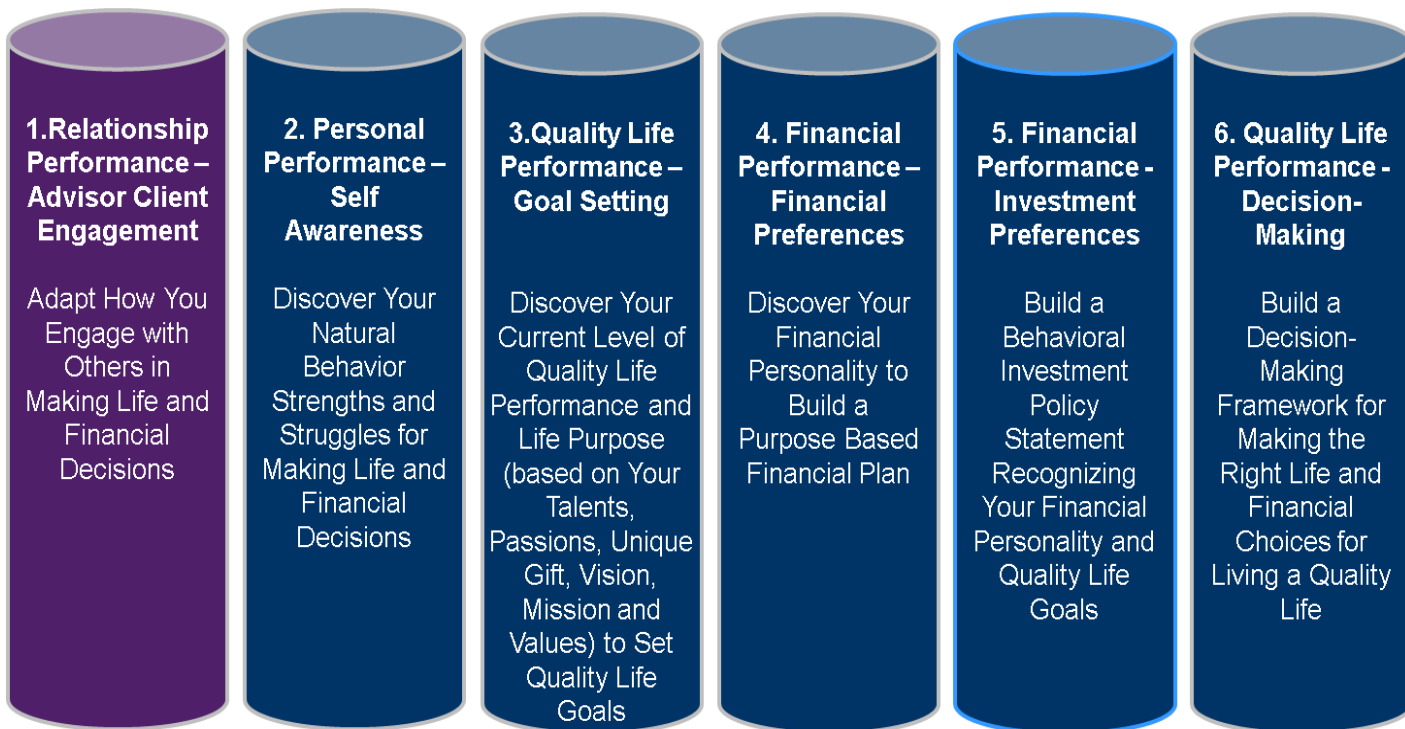
Program Overview

The Certified Wealth Mentor Training Program helps you to become Behaviorally SMART by learning unique financial personality insights for helping your clients to achieve greater self-empowerment.

You will learn how to deploy the 6 pillars of DNA Financial Planning Performance using the internationally recognized Financial DNA Discovery Processes.

Further, our highly structured and tangible Financial Planning Performance Planning Process will enable you to charge higher advisory fees and increase profitability on a sustainable basis.

6 Unique DNA Financial Planning Performance Solutions



The uniqueness of the Financial DNA approach to business is characterized by:

1. The unparalleled depth and reliability of the Financial DNA Discovery Processes for predicting natural behaviors for helping clients build greater self awareness of their life and financial strengths and struggles, and how they are inter-related for making the right choices to build a Quality Life.
2. Helping advisors measure Quality Life and Financial Performance and then customizing client and advisor experiences with the matching of life, financial, investment solutions based on life and financial behavior insights.
3. Increasing the emotional engagement of advisors and clients through the mutual sharing of behavioral insights and higher levels of behavioral modification.

Program Deliverables You Will Access and Learn: DNA Behavior Discovery Process, Resources and Books

1. Relationship Performance Deliverables:
•Communication DNA Reports



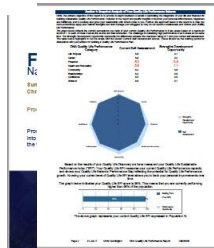
*Communication
DNA Report*

1. Personal Performance Deliverables:
•Financial DNA Natural Behavior
Discovery Completion
• Comparison Report
• DNA Ultimate Performance Guide



*Financial DNA
Natural Behavior
Discovery Reports
– Financial
Planning, Wealth
Mentoring*

3. Quality Life Goal Setting Performance
Deliverables:
•Quality Life Discovery Completion
•Quality Life Planning Discovery
•Setting Quality Life Goals



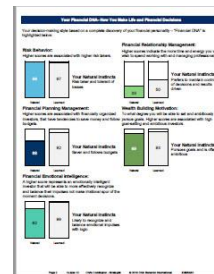
*DNA Quality
Life
Performance
Report*

4. Financial Performance Deliverables:
•Financial Personality Discovery Completion
•Financial Behavior Analysis



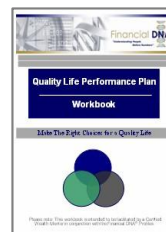
*DNA
Financial
Performance
Report*

5. Investment Performance Deliverables:
•Behavioral Roadmap
•Behavioral Biases



*Behavioral
Roadmap*

6. Quality Life Decision-Making Deliverables:
•Quality Life Performance Plan Workbook
•Quality Life Definition and Measurement



*Financial Planning
Performance Plan
Workbook*