

Financial DNA[®]

Natural Behavior Discovery

DNA Group Performance Report for:Williams Family

Providing key insights into how you can navigate the human differences in your group for building a sound working relationship together.

Unique DNA Natural Behavior Styles in Your Group

The DNA Group Performance Report provides key insights into how your group can navigate the human differences building a sound working relationship together. The report reflects the different natural behavior styles of the group members. Natural behavior will generally remain consistent over time as it is the core of who your group members are. However, the report does not reflect how your group members may from time to time modify their behavior in certain situations based on experiences, education and values.

The DNA Natural Behavior Style and two strongest behavioral factors for each member of the group are shown in the table below. The members of your group have been sorted by DNA Natural Behavior Style so that each group member can identify others in the group that are similar to them.

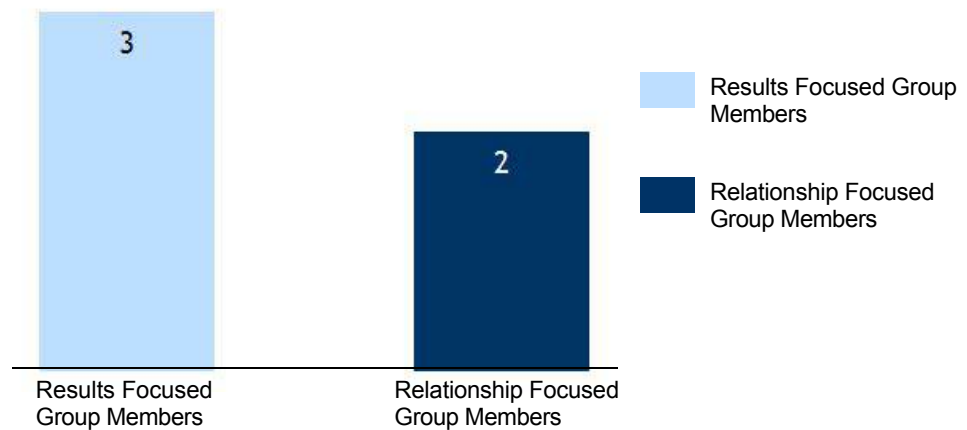
The group leader has been highlighted in bold throughout this report.

Group Member	DNA Natural Behavior Style	Strongest Behavioral Factor 1	Strongest Behavioral Factor 2
John Williams	Influencer	Spontaneous	Risk-Taker
George Williams	Community Builder	Outgoing	Trusting
Sarah Williams	Initiator	Creative	Fast-Paced
Brian Williams	Strategist	Skeptical	Reserved
Mary Williams	Stylish Thinker	Anchored	Cooperative

2. Summary of the Group's Natural Behavior for Building Relationships and Getting Results

Results Focused vs. Relationship Focused

The following graph shows the number and percentage of individuals in the group that are Results Focused and Relationship Focused. Overall, this will indicate the group's natural tendency towards building relationships and motivations to getting results. A Results Focused group will be more task oriented, while a Relationship Focused group will be more human engagement oriented.



Results vs Relationship Focused Summary

Results Focused

John Williams
 Brian Williams
 Sarah Williams

Relationship Focused

Mary Williams
 George Williams

Total Number of Group Members:	5
Results Focused Group Members	3
Relationship Focused Group Members	2

Your Group's Overall Quality Life Behavioral Attitudes

Your group's overall natural motivations, desires and approach to Quality Life are reflective of the two strongest behavioral factors calculated by averaging each individual group member's factor scores. The primary Quality Life Attitudes for the group are summarized in the table below.

	Group Quality Life Attitude 1	Group Quality Life Attitude 2
	Fast-Paced Factor	Spontaneous Factor
Quality Life Outlook	Welcomes change	Flexibility
Wealth Creation Philosophy	Results oriented	Flamboyant
Financial Attitude	Seeks high returns	Spend it
Financial Goal Setting Approach	Dynamic	Needs boundaries
Activity Passion	Rationalizing situations	Improvisation
Values	Logic	Freedom
Planned Giving Motivation	Seeing outcomes	Fun
Strength	Dealing with change	Instinctive
Blind-spot	Impatient	Impulsive
Communication	Get to the point	Provide broad facts

Your Group's Overall Financial Planning Insights

Based on the average of the behavioral factors of all group members, the group's overall financial planning insights are shown below. These insights are ordered showing those that are likely to be more intensively displayed first, and the more moderate insights displayed last. Some of these areas will be positive areas to be utilized in increasing productivity of the group, others could be "blind-spots" without awareness.

Insights	L/M/H	Pop %
Sets the Agenda for the Planning Process	Medium	50 %
Patiently Builds long-term Relationships	Medium	46 %
Focus on Bottom Line Results	Medium	58 %
Risk Propensity for Taking Chances	Medium	54 %
Risk Tolerance for Living With Losses	Medium	58 %
Sets Goals for Ambitious Plans	Medium	62 %
Pursues Goals to Stay Focused on the Plan	Medium	46 %
Comfort to Deal With Change and Make Decisions	Medium	66 %
New Idea Driven for Investing in Solutions and Products	Medium	66 %
Financially Organized and Follows Budgets	Medium	34 %
Need for Information, Research and Analysis	Medium	34 %
Spending Desire on Lifestyle Items	Medium	66 %
Need for Control Over Financial Planning Decisions	Medium	54 %

Group Member Behavioral Factor Analysis

Shown below are individual scores for each behavioral factor in a range of 20 (left side) to 80 (right side).

To the extent your group members have strong behavioral factors over 60 and under 40, there is a higher chance the behavioral insights in this report will be more intensively displayed when they are making life and financial decisions. Scores closer to 50 indicate a more moderate style that is typically more flexible in that behavioral factor.

Factor scores for each column have been sorted low to high based on strength.

Core Financial Life Drivers

The following 5 factors representing the Core Financial Life Drivers provide specific insights into a group member's natural talents, strengths and struggles. Overall, these factors will indicate their natural desire to build relationships and also their motivations to getting results. If group members have scores which are high on Take Charge, Fast-Paced, Planned and Skeptical they will be more results and tasks focused. If group members have scores which are high on Cooperative, Outgoing, Patient and Trusting they will be more relationship focused.

Factor 1: Commanding

20	Cooperative (Practical)	Mid-Range	Take Charge (Visionary)	80
	(40) Mary Williams	(46) George Williams (53) Sarah Williams	(59) Brian Williams (60) John Williams	

Factor 2: People

20	Reserved (Focused)	Mid-Range	Outgoing (Expressive)	80
	(39) Brian Williams	(45) Sarah Williams (53) Mary Williams (54) John Williams	(71) George Williams	

Factor 3: Patience

20	Fast-Paced (Logical)	Mid-Range	Patient (Tolerant)	80
	(37) Sarah Williams (39) Brian Williams (39) John Williams		(56) Mary Williams (58) George Williams	

Core Financial Life Drivers (Continued)

Factor 4: Structure

20	Spontaneous (Instinctive)	Mid-Range	Planned (Systematic)	80
(34) John Williams		(46) Sarah Williams	(56) Brian Williams	
(36) George Williams			(57) Mary Williams	

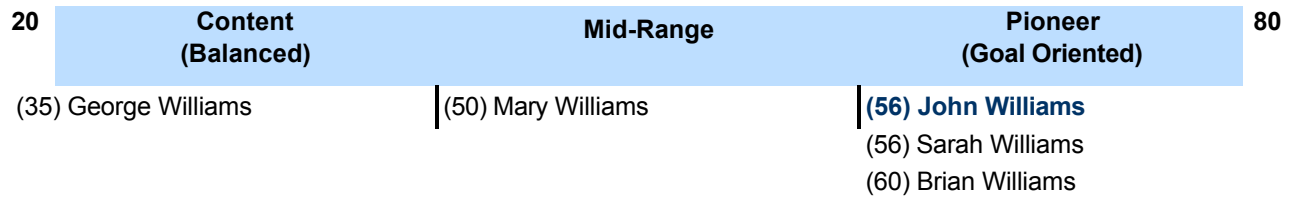
Factor 5: Trust

20	Skeptical (Questioning)	Mid-Range	Trusting (Believing)	80
(36) Brian Williams		(50) John Williams	(69) George Williams	
(44) Sarah Williams		(55) Mary Williams		

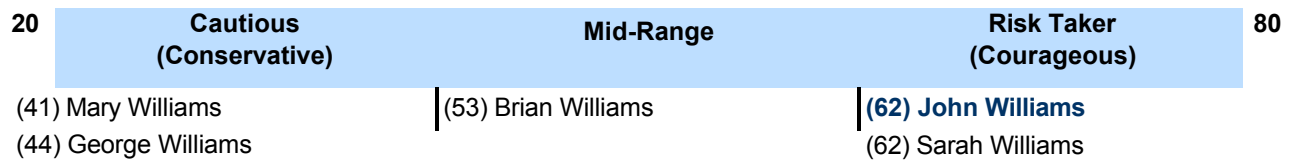
Financial Life Planning Drivers

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

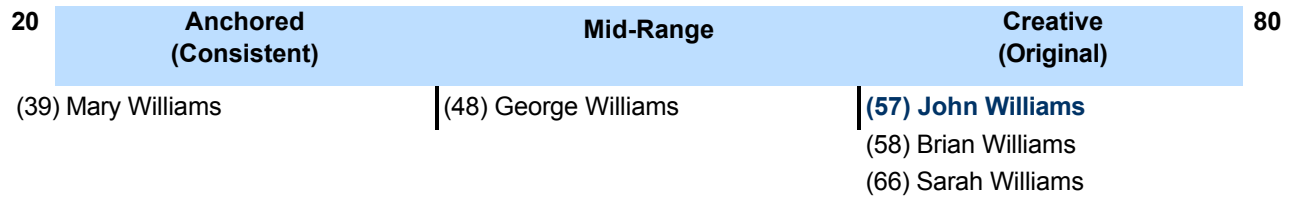
Factor 6: Pioneering



Factor 7: Risk



Factor 8: Creativity



Appendix A: Summary of Group Member Behavioral Strength and Struggles

Group Member	Strongest Behavioral Factors	Behavioral Factor Strengths Motivated to be:	Behavioral Factor Struggles Can be too:
John Williams, Influencer	Spontaneous Risk-Taker	Instinctive, Flexible Daring, Courageous	Unfocused, Impulsive Carefree, Overconfident
Brian Williams, Strategist	Skeptical Reserved	Questioning, Guarded Reflective, Focused	Doubting, Wary Withdrawn, Private
George Williams, Community Builder	Outgoing Trusting	Expressive, Recognized Receptive, Believing	Talkative, Emotional Forgiving, Naïve
Mary Williams, Stylish Thinker	Anchored Cooperative	Consistent, Experience driven Practical, Diplomatic	Reliant on proof, Tied to old ways Hesitant, Passive
Sarah Williams, Initiator	Creative Fast-Paced	Original, Imaginative Logical, Challenging	Easily bored, Abstract Impatient, Critical

Appendix B: Summary of Group Member Behavioral Performance Environment Keys

Group Member	Strongest Behavioral Factors	Performance Environment Keys
John Williams, Influencer	Spontaneous Risk-Taker	Provide broad facts Present risk/return
Brian Williams, Strategist	Skeptical Reserved	Provide logic and key points Allow reflection time
George Williams, Community Builder	Outgoing Trusting	Tell me who is involved Present feelings/emotions
Mary Williams, Stylish Thinker	Anchored Cooperative	Keep it tangible, Provide the logical steps Encourage input
Sarah Williams, Initiator	Creative Fast-Paced	Encourage brainstorming Bottom line results, Speak/move at a quick pace

Appendix C: Summary of Group Member Behavioral Biases

The behavioral biases highlighted below are all patterns of behavior which if not managed can cause a client to make irrational decisions on a regular basis, increasing the risk of not achieving their goals. Discuss the strongest behavioral biases with members of your group and agree a strategy for managing them.

Group Member	Behavioral Bias 1	Behavioral Bias 2
John Williams	Instinctive	Optimism Bias
Brian Williams	Controlling	Mental Accounting
George Williams	Herd Follower	Fear of Regret
Mary Williams	Loss Aversion	Benchmark Focus
Sarah Williams	Newness Bias	Over Trading

Disclaimer

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