Financial DNA®
"Understanding People Before Numbers"

Accelerate Your Practice

Financial DNA®

Accelerate Your Practice Process
Based on the Philosophy of Understanding People Before Numbers

Name:

Date:

Financial DNA Resources, Inc.
3340 Peachtree road NE Suite 1800
ATLANTA GA 30326

Phone: 404 812 5318

www.financialdna.com

Advisor Facilitation

Connecting the Advisor to the Profile

1. How did you feel about your profile?
2. Do you believe the profiles are accurate?
3. What aspects do you agree and disagree with?
4. What parts of the profiles do you not understand?
5. Have the profiles told you something new about yourself?
6. Have the profiles identified differences with others?
7. Have you showed your spouse? If so, what do they think?
8. What do you believe is your greatest behavioral talent?
9. What part of your behavioral style do you struggle with most?
10. How have you learned to adapt your behavior?

Key Profile Interpretation Points

1. Profiles measure natural "hard-wired" behavior only
2. Path 6 ("MRI Scan") will be more accurate than Path 4 ("X Ray")
3. Confirm the correlation of Path 4 and Path 6
4. Scores <40 and >60 reflect dominant behaviors and are more ingrained
5. How do dominant traits interact with mid-range traits?
6. What is the influence of environment, education and values on decision-making?
7. How do the profile factor relationships change for financial, career, family and life?

Take the Advisor's Quality Life Pulse

1. Where is your life going well right now?
2. What is your greatest strength?
3. What is the purpose for your life?
4. What are you passionate about?
5. What is important to you?
6. When are all aspects of your life working well together?
7. How do you plan to realize your life and financial potential?
8. What are the best and worst decisions you have made?
9. Are your business and family relationships aligned?
10. How do you want to be remembered?

Practice Development

Practice Discovery

1 How could you do more to enhance your clients' quality of life and at the same time, your own?
2. What is the value add that you provide to your clients? What is the service specialty? How do your clients remember your business? What services are your clients looking for?
3. What is the type of practice that you are aiming to have? Where do you see your practice in 5 years? How do you see it being differentiated? What is the ideal world for your practice?
4. What are the challenges your business currently has? Where could you improve and overcome them? What are the industry issues affecting you?
5. Are you concerned about how to differentiate and de-commoditize your practice?
6. Are you challenged by how to secure new clients, retain existing clients, increase your share of the portfolio and choose the right clients?
7. How would you use Financial DNA with your clients?

Align Your Client Engagement Strategy to Who You Are, Based on Your Financial DNA Profile

Client Acquisition (How do you connect with clients?)
1.
2.
3.

First Meeting Goals (What are your objectives for the first meeting?)
1.
2.
3.

Client Discovery Process (How do you learn who your clients are and their goals?)
1.
2.
3.

Your Advisory Style (How do you approach the advisory process?)
1.
2.
3.

Client Retention (How do you maintain and build the client relationship?)
1.
2.
3.

Accelerate Your Life Purpose

Coaching: Going Further With Advisor Personal Discovery

Passion (Why do you do what you do? What gets you out of bed each day?)

Talents (What is your primary strength from each of the 6 Path Profile factors?

1.

2.

3.

4.

5.

6.

Unique Gift (What are you the best in the world at?)

Values (What are the principles that govern your decision-making?)

Life Purpose (What is the core framework that will govern your major decisions?)