



Your Work Talents Report

Carol Pocklington's Unique Style: Facilitator

Facilitators are good at guiding people with feelings yet with the determination to reach goals and accomplish tasks. They are well suited for situations where setting the agenda and recognizing the needs of other people are required. They flourish in an environment where there is plenty of stability, group decision-making is needed and where they are recognized for the contribution they make.

Your Top Talents:

Based on your 8 factor scores, your 2 strongest scores (traits) are:

- Creative** - Explores possibilities, innovative, driven by ideas
- Reserved** - Analyzes, has high propensity to reflect, guarded

How Others Can Connect with and Manage Your Talents:

- Expect/encourage my out-of-the-box thinking
- Encourage me to brainstorm
- Recognize my desire to investigate ideas
- Honor my need to reflect and think
- Allow me time to process my response

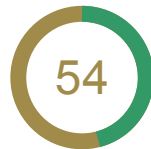
Your Contrasting Work Talents:

The shaded circles and scores below indicate your strength level as a percentage of the population with the corresponding descriptor in the same color.



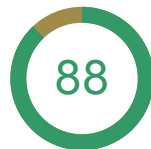
Results vs. Relationships

Keeps a balance between achieving results and supporting people



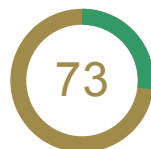
Daring vs. Careful

Some spirit of adventure but not a high risk taker



Abstract vs. Concrete

Innovative with ideas and seeks to differentiate



Systematic vs. Flexible

Will be flexible in approach but may not prepare or be organized enough



Promoting vs. Operating

Engaging and relational with others but also enjoys operating alone

About this Report:

The information in this report reflects more than 30 years of research and experience in developing individual's workplace talents. This report is intended to give you a glimpse of your unique talents, and in-depth reports are available that provide your specific scores as well as a development plan.

Why this is Important:

Your best working style is being your authentic self. With objective knowledge of yourself, you're better able to authentically work and grow into a better coworker, leader, and person outside of work. Likewise, understanding yourself gives you a much better basis to understand and manage others.

Share Your Business DNA With Others:

Share your results with your colleagues, coach and other mentors. The guide below illustrates how the 10 unique styles are similar or different to others.





Your Financial Behavior Report

Carol Pocklington: Facilitator

Provided by your advisor: **Chris Coddington**

Facilitators are good at guiding people with feelings yet with the determination to reach goals and accomplish tasks.

Your Financial Behavior

Your results show that you take a balanced approach to money. This means you're fine with taking some calculated risks to make some gains, but prefer not to put all your eggs in one basket.

Your Behavioral Biases

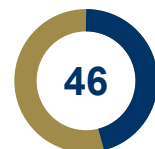
These biases may get in the way of wise decision making. Your advisor will discuss strategies to help you manage your instincts in your financial plan.

Newness Bias - Likely to give more weight to recent information and ideas.

Mental Accounting - Likes to put money into separate buckets for specific purposes.

Your keys to adopting a plan

- Expect/encourage my out-of-the-box thinking
- Encourage me to brainstorm
- Honor my need to reflect and think



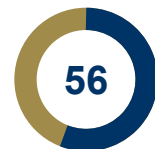
Risk behavior

Safely manages risks and able to see pitfalls
Higher scores are associated with higher risk takers.



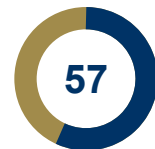
Financial relationship management

Delegates to advisors and results driven
Higher scores indicate the more time and energy you wish to spend working with your financial adviser.



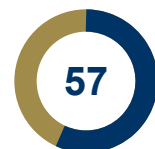
Financial planning management

Saver and appreciates spending freedoms
Higher scores are associated with financially organized investors, and indicate tendencies to save money and follow budgets.



Wealth building motivation

Pursues goals and is often ambitious
Higher scores are associated with high goal-setting and ambitious investors who set and ambitiously pursue goals.



Financial emotional intelligence

Likely to recognize and balance emotional impulses with logic
Higher scores represent emotionally intelligent investors who will be able to more effectively recognize and balance their impulses.

The Importance of Understanding Your Financial Behavior

For advisors to provide valuable advice, it is key that they understand you and your goals. Measuring and discussing your financial behavior is a first step for your advisor to get to know you. Your financial behavior describes how you make decisions around money, your communication style, how you react to market events, and what motivates you to achieve your goals. These elements help drive a financial plan that is appropriate and custom for you.

Other factors may influence the investment strategy that is ideal for you such as;

- Amount of time you planned to achieve your goals
- Risk and return required to achieve your financial goals.
- Experiences such as education, upbringing, and life lessons that may have changed your approach to finances throughout your lifetime.

Share Your Financial DNA With Others

Share your results with family members and other mentors. The below guide illustrates how the 10 unique styles are similar or different to others.

