



Your Work Talents Report

Leon Morales' Unique Style: Initiator

Initiators like to take bold, aggressive actions and create the rules. They will prefer to lead decision-making, setting the agenda for others to follow and monitoring the timely completion of tasks. They are goal driven people who like their expectations managed and not to get caught up in unnecessary details. Their decision-making will typically be fast-paced and rational. They will not be afraid to take on challenging assignments or to accept a lot of risks to realize their ambition.

Your Top Talents:

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

- Spontaneous** - Free-flowing, high level approach, instinctive
- Risk-Taker** - Venturesome, takes chances, optimistic

How Others Can Connect with and Manage Your Talents:

- Allow me plenty of freedom
- Use graphics and verbal communications
- Resist the temptation to prematurely edit my ideas
- Present me with opportunities
- Present me with the risks and return

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

Confidently takes risks and tolerant of losses



Abstract vs. Concrete

Uses a mixture of imaginative and practical ideas to solve problems and initiate change



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

Leon Morales: Initiator

Provided by your advisor: **Hugh Massie**

Initiators like to take bold, aggressive actions and create the rules.

Your Financial Behavior

Your results show that you take an accumulation approach to money. This means you like to invest in the right opportunities when it comes to investing, but prefer not to take on too much risk because accumulating wealth over the long term is your main objective.

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.

Over Confidence - Can think they are more successful at investing than they really are.

Fear of Regret - Hesitant in case will miss out on a potential gain from the next best thing.

Your keys to adopting a plan

- Allow me plenty of freedom
- Use graphics and verbal communications
- Present me with opportunities

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.



Risk behavior

Risk taker and tolerant of losses

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

Desire to spend and appreciates spending freedoms

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



Wealth building motivation

Prefers flexible 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.