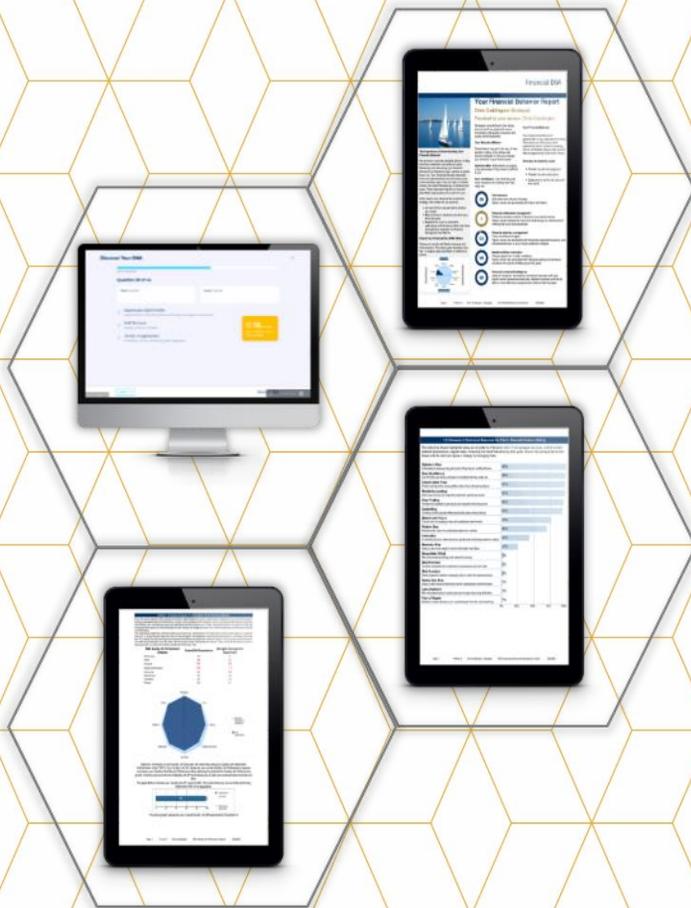
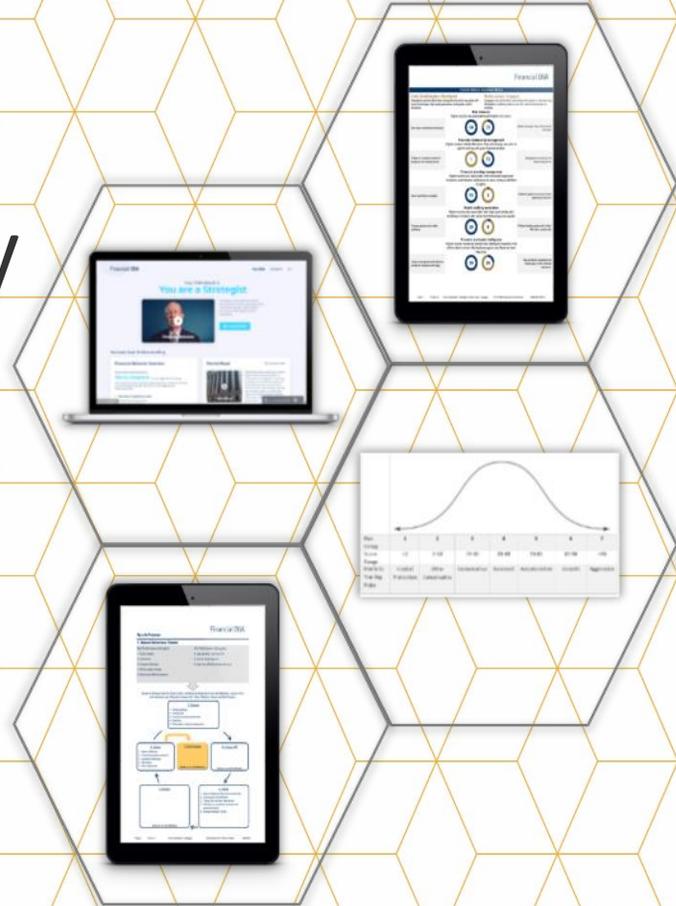


Part 2: Authentic Identity Empowerment Exercises



Please note: This workbook may only be facilitated by a currently licensed Certified DNA Performance Advisor or Certified Wealth Mentor in conjunction with the DNA Behavior Discovery Processes.

Introduction

Our Definition of Identity

“Identity” is what defines us in the eyes of others. It is who we want to become based on who we are, instead of what we do or what we (currently) are.

Your identity reflects **“you are a human being and not a human doing”**. In this regard, you need to distinguish between purpose-based identity versus the tasks you do. That is what you need to discover. Then you need to be guided to more confidently and wisely make committed life and financial choices for leveraging your identity and to live a Quality Life.

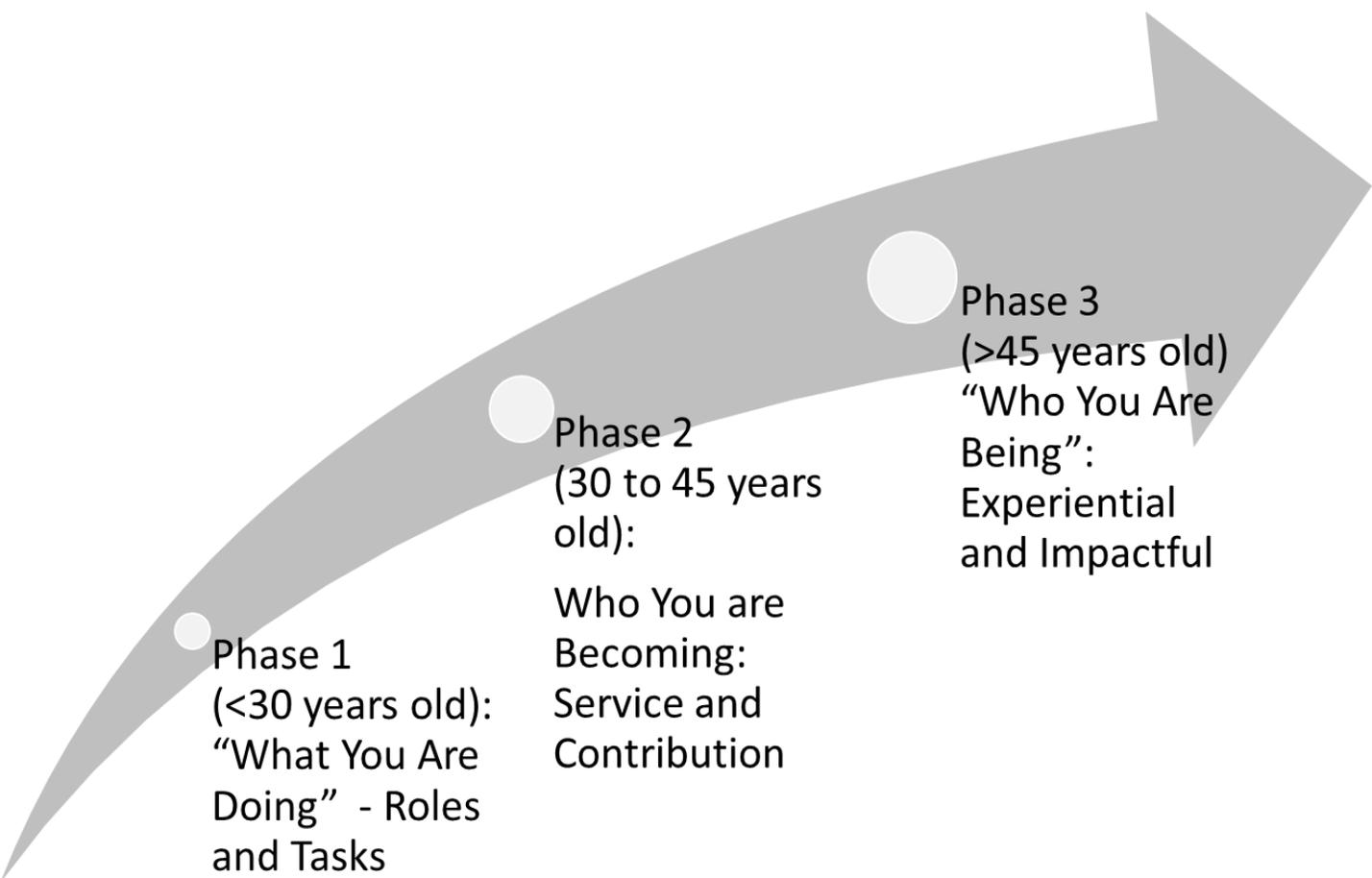
This is achieved through firstly discovering your unique talents based on completing the DNA Natural Behavior Discovery Process. In this workbook you will be facilitated through the following 5 key areas with a range of exercises and self-reflection.



Introduction

Breaking Down Your Identity's Evolution

The make-up of your identity reflects your life journey. Typically, your life journey will have a phase which reflects the functions you perform. Then as you experience more life, and then grow and develop, your identity will evolve to reflect contributions and ultimately your being. When you are in the phase of “being” through having greater clarity of your X-Factor and Life Purpose, then you will be in a stronger place to create impactful experiences for others. You will also grow exponentially from being in this wonderful place.



1. Discovering Your X-Factor – Getting to the Truth of Your Unique Gift

“What the world’s greatest managers do differently is identify a person’s talents. The talents cannot be taught. They reflect any recurring patterns of behavior that can be productively applied. The right talents are pre-requisites for excellence in any roles” – Marcus Buckingham and Curt Coffman in *First Break All The Rules*

Modules 4 to 11: X-Factor Discovery

The x Steps to Discovering Your X-Factor

**Module
4**

**Review Your Life, Abilities and
Identity**

**Module
5-6**

**Past Experiences Discovery and
Examine Your Identity So Far**

**Module
7-8**

Natural Behavior Talents Discovery

**Module
9**

Identify Your Dominant Talents

**Module
10**

Passion Discovery

**Module
11**

Discover Your X-Factor (Unique Gift)

Module 4: Review Your Life, Abilities and Identity

Exercise: Reflect on your life and abilities so you can start to see how you have arrived at today's place and then to start determining what path you will go in the future with the "human capital" assets you have, including defining your identity. In order for you to discover your identity at a deeper level please choose 3 questions below you feel need the most discussion with your Performance Advisor and indicate why.

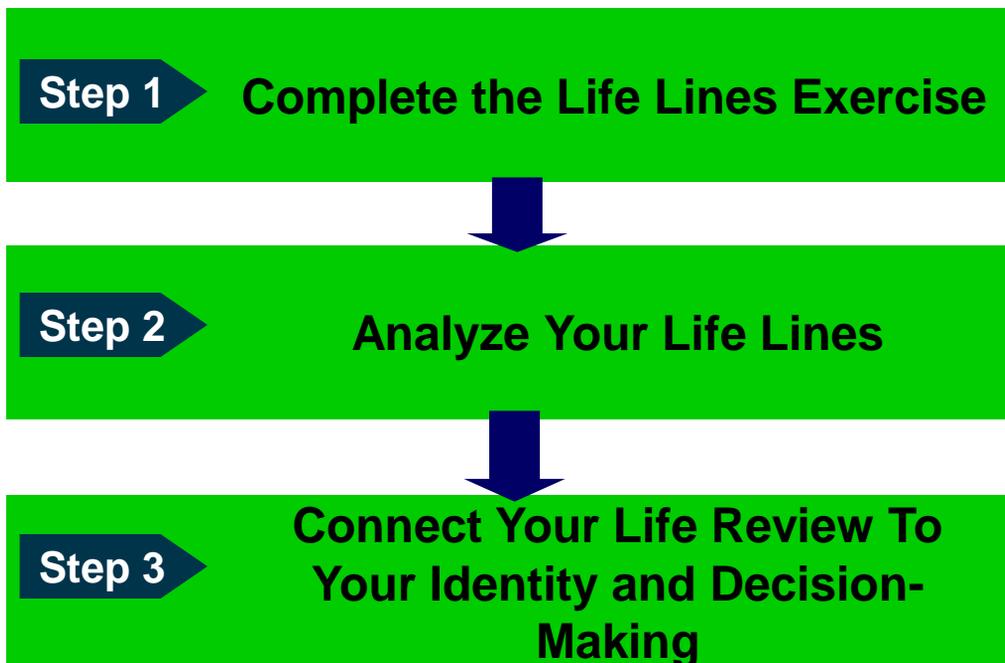
1. What was a pivotal moment for you in your life and/or career? What was the trigger for that?
2. What is your stand-out talent? How have you seen your talents play out?
3. What are your top skills and competencies that have been developed from education and training?
4. How do your talents connect to your passions?
5. What are your strengths and struggles?
6. When are you most confident?
7. What has been a de-railer for you in achieving success?
8. What values, beliefs and preferences drive your life and financial decisions?
9. What do you see your identity as? Where will your greatest impact be?
10. What steps do you need to take to evolve yourself and reach your potential?

Questions that need the most discussion and why...

- 1.
- 2.
- 3.

Module 5: Past Experiences Discovery

Reviewing Your Past Experiences for Making Committed Decisions



Module 5: Past Experiences Discovery

Step 1

Complete the Life Lines Exercise

Objective:

To start identifying the high and low points of your life in order to gain insight into:

- Your life path to date
- Significant events which have impacted your confidence and also your identity and decision-making
- Recurring positive and negative patterns of behavior
- The critical points in your life – “where corners were turned”
- The event that had the greatest impact on where you are now
- When significant people have come into your life and the impact of that
- Your transitions from “doing” in your life to “being”

Exercise: Complete the Life Lines Exercise that follows.

1. Map your life from birth to now in 5 year cycles. You may find this easier to do if you firstly write down a chronological list of your life transitions.
2. Identify highs and lows in the following areas:
 - Family
 - Career/Business
 - Education (school/college, post school/college)
 - Finances

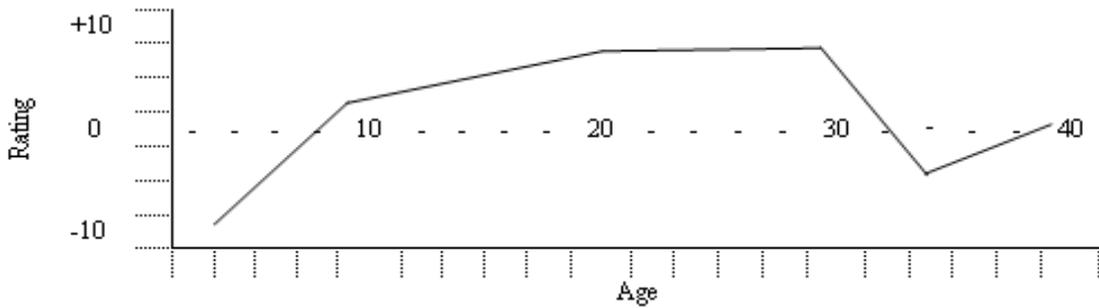
Example:

1. Chris Coddington has done the Life Line Exercise, which provides great insight into the story of his life, his behavior, and how he sees the world.
2. Chris has plotted his life from birth to the age of 39 years, covering the four specific areas mentioned above. See the attached sheet for the outcome of Chris’ Life Line Exercise.
3. Your own Life Line will be completed after you view Chris’.

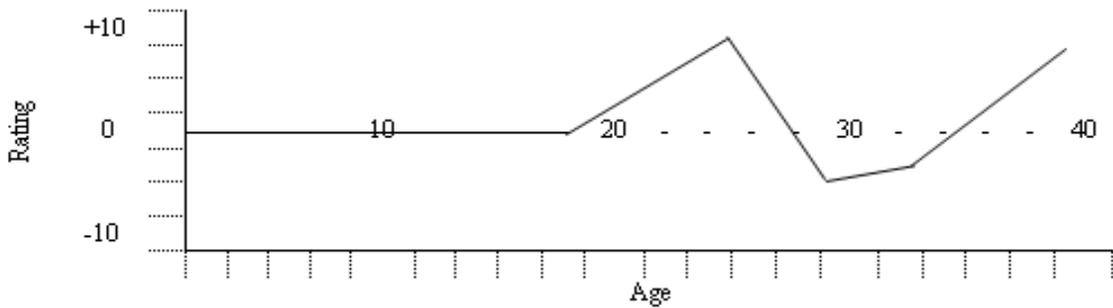
Module 5: Past Experiences Discovery

Chris Coddington's Life Lines to Age 39

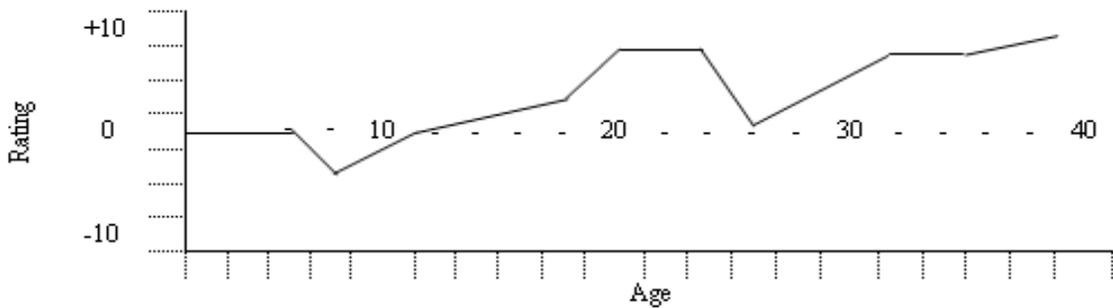
My Life Line: Family/Personal



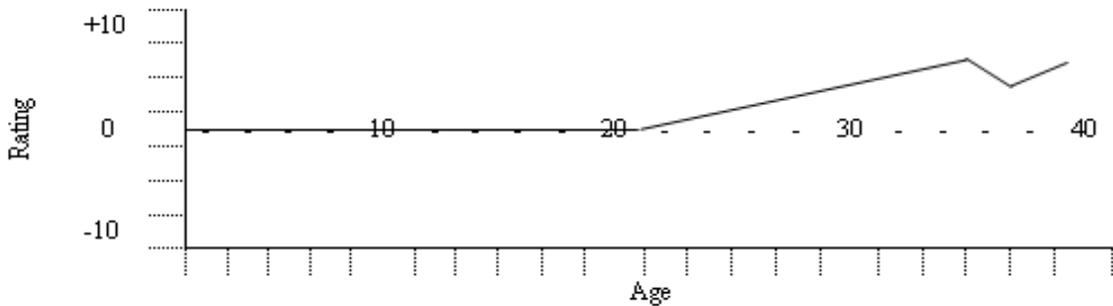
My Life Line: Career/Business



My Life Line: Education



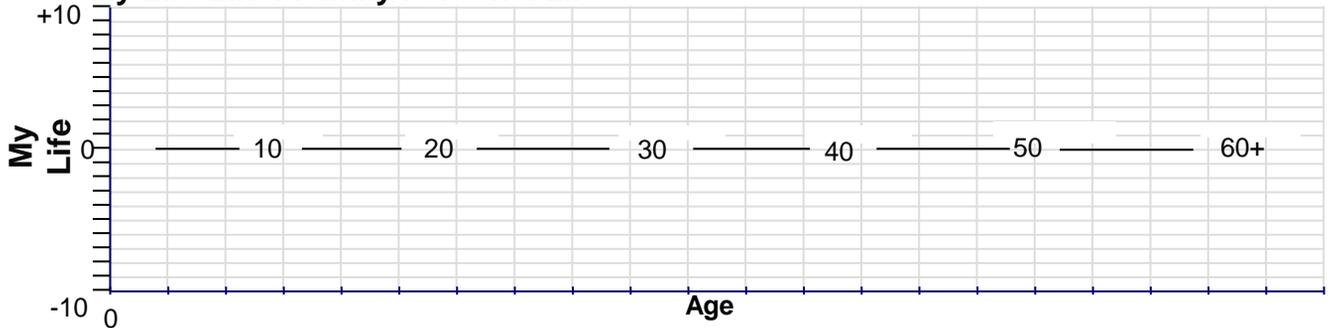
My Life Line: Finances



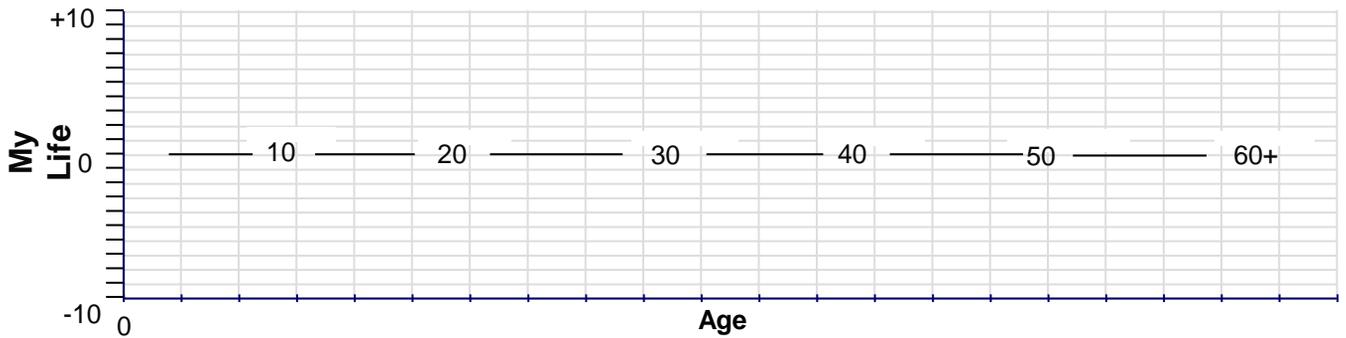
Module 5: Past Experiences Discovery

Name:

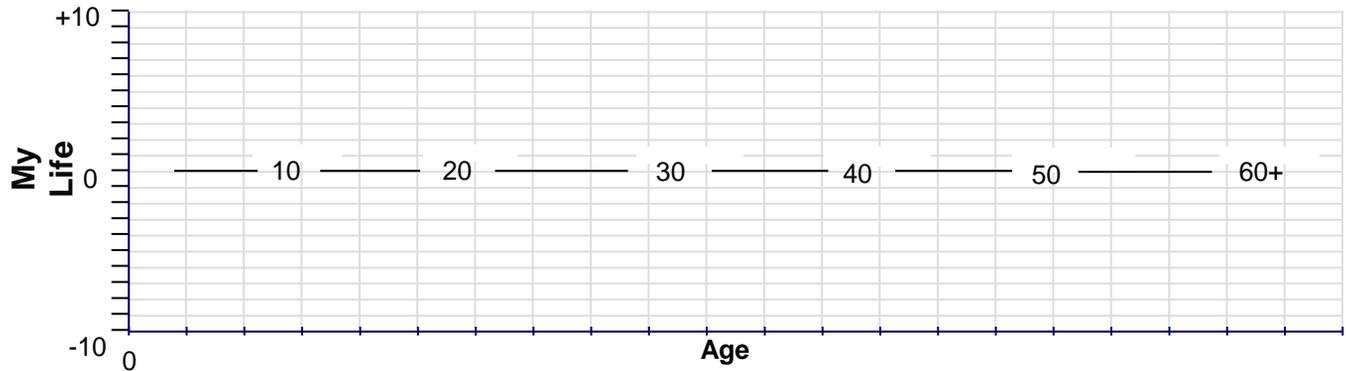
My Life Line: Family/Personal Life



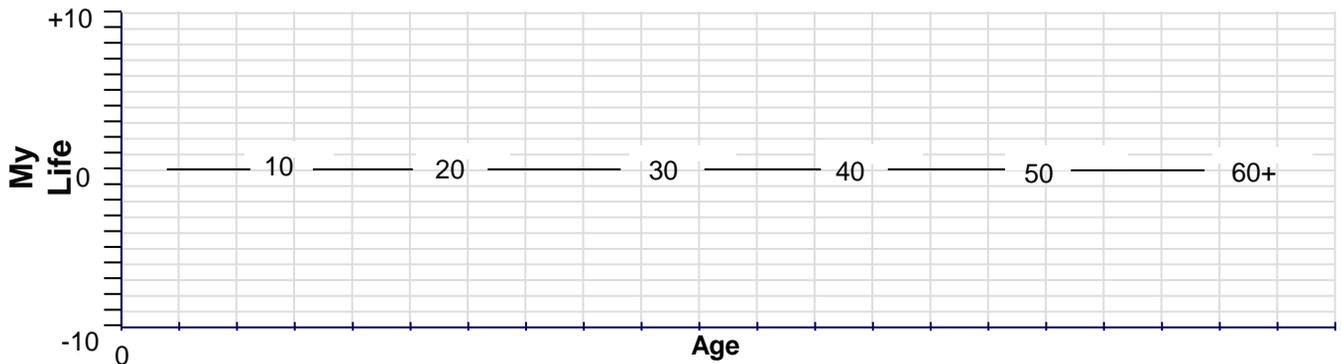
My Life Line: Career/Business



My Life Line: Education



My Life Line: Finances



Module 5: Past Experiences Discovery

Step 2

Analyze Your Life Lines and Past Experiences Discovery Responses

Exercise: Using your Life Lines, answer the following questions.

1. Identify 3 major turning points that significantly influenced your identity and decisions.

1.

2.

3.

2. Identify when significant people entered your life (e.g. spouse, mentor, business associate) and how this influenced your identity and decisions.

1.

2.

3.

Module 5: Past Experiences Discovery

Step 3

Connect Your Life Review To Your Identity and Future Decisions

Exercise: Based on your Natural Behavior Discovery, and other exercises, what are 3 lessons you have learned?

1.

2.

3.

Exercise: How will your identity be impacted as a result of these lessons?

1.

2.

3.

Module 6: Examine The Make- Up Your Identity So Far

Exercise: Based on your Life Lines, identify your “Doing” (typically emerges during ages 18 to 30) and your “Becoming” (typically emerges during ages 31 to 45). In addition, identify your “Being”(typically emerges after age 45) based on where your life is at now. However, recognize that as you progress through the following X-Factor and Life Purpose Discovery exercises your Being (and hence Identity) will become clearer Note, as your get older and go through more life experiences some of your Being may evolve even further.

1. Doing

Functions
Roles or Jobs
Skills
Education
Activities
Heritage
Social Status

2. Becoming

Drivers
High Performance
Areas of Higher
Confidence
Stand-Out Talent
Accomplishment

3. Being

- Impactful
- X-Factor
- Passion
- Calling, Purpose
- Experiential
- Flow
- Distinguishing
- Values, Governs Choices
- Pride

Module 6: Examine The Make- Up Your Identity So Far

Chris Coddington to Age 39

1. Doing

Tax Advisor
Investor
Life Guard
Golfer
Australian

2. Becoming

- Investment Banker
- Trusted Financial Advisor
- Entrepreneur
- Global Citizen

3. Being

- TBA after Life Purpose Discovery in Section 2
- Searching

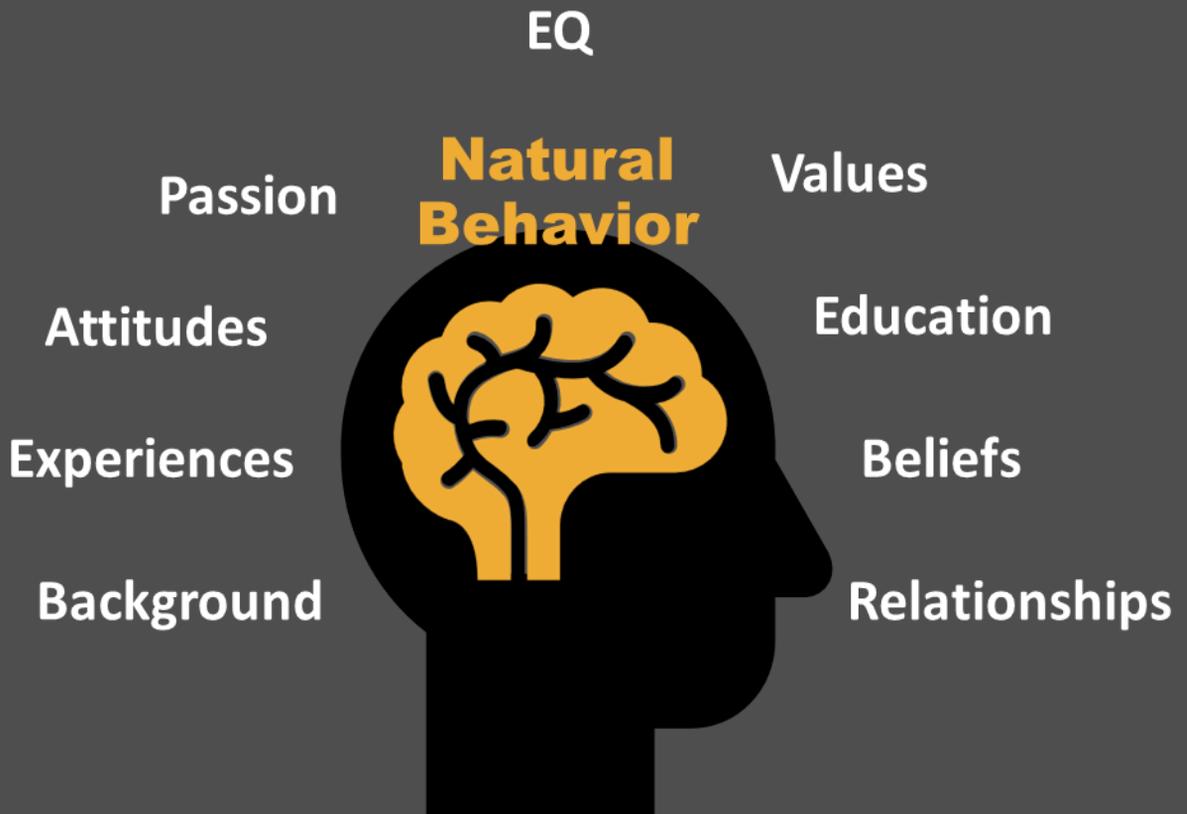
Your Identity Make-Up So Far

1. Doing

2. Becoming

3. Being

Identify Your Behavioral Patterns



Identify how recurring behavioral patterns have contributed to your:

Tier 1: Functional Roles

Tier 2: Service & Contribution

Tier 3: Being - Experiential and Impactful

Module 7: Natural Behavior Talents Discovery

About Natural Behavior Discovery:

Natural Behavior is foundational to:

- How you experience life
- Maintaining and using your energy
- Communication styles and relationships
- Passions, values, life purpose and goals
- Your relationship with yourself - which impacts your definition of wealth and money



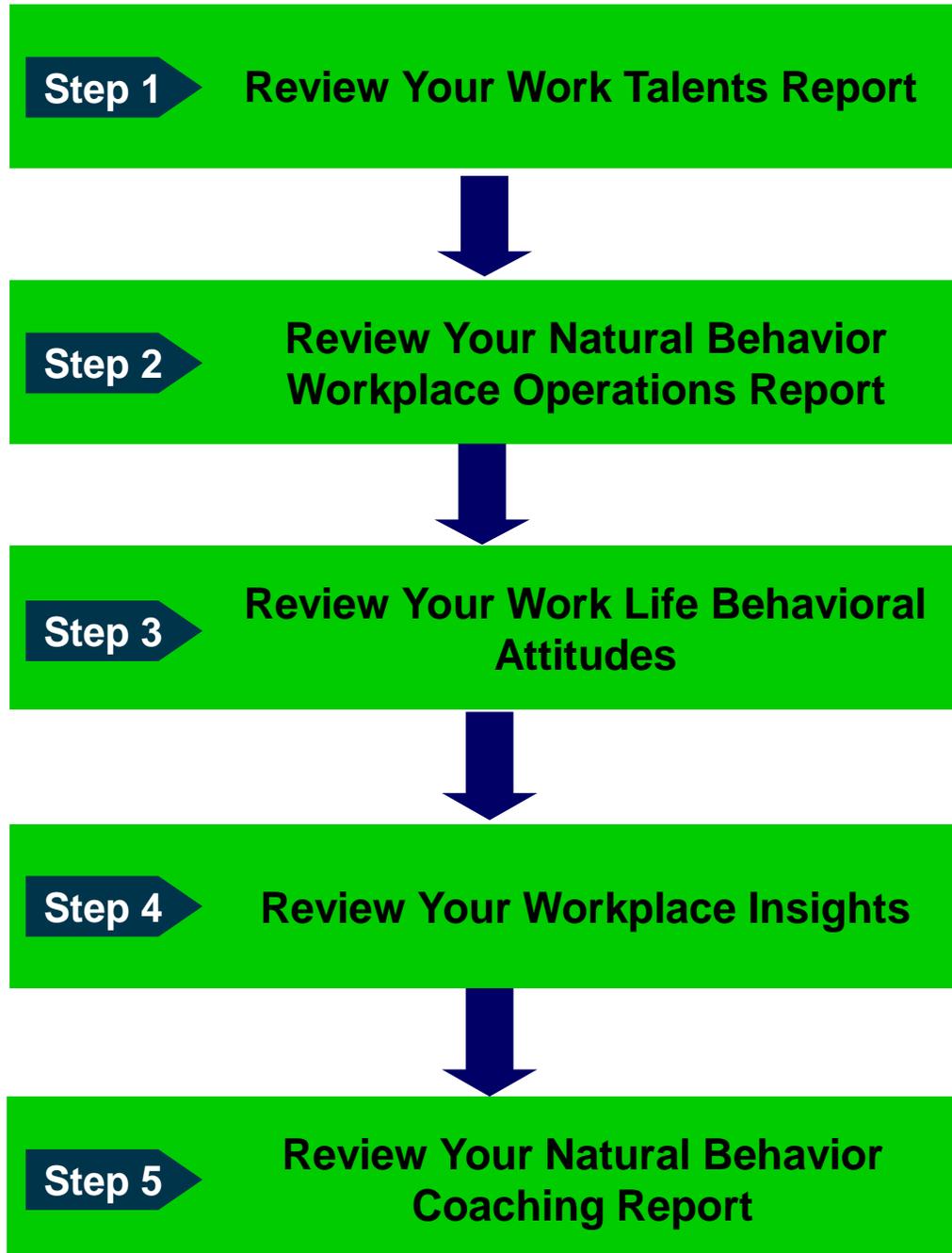
For greater interpretation and understanding of your Natural Behavior Discovery, see the DNA Unlocking Human Capital Performance Guide in the online DNA Behavior Resources area. For more information contact inquiries@dnabehavior.com

The Business DNA Natural Behavior Discovery measures natural “hard-wired” behavioral talents only:

- Measurement on eight behavioral factors
- Do not identify baggage or mental health
- The outcomes remain stable over time
- There are no ‘good’ or ‘bad’ styles and they should not be used to put individuals in a ‘box’
- No decision should be made solely on the report
- The measurement is gender neutral
- Based on validation, the behavioral factor measurements are right 90% of the time

Module 7: Natural Behavior Discovery

Interpreting and Applying the Business DNA Natural Behavior Discovery Process



Module 7: Natural Behavior Discovery

Step 2 Review Your Workplace Operations Report

Objective behavioral awareness is critical. Playing to your strengths consistently will maximize your potential. Although, strengths over-played can become blind-spots.

Exercise: Complete the steps below to identify the key aspects of your natural behavioral style from the Workplace Operations Report.

1. What additional insights do you have about the 2 strongest behavioral factors in what they say about who you are and how you operate?
 - i)
 - ii)

2. How will knowing your strengths and struggles help you improve your life and work performance

Strengths:

Struggles:

3. What are the 2 most important performance environment keys in terms of how you wish to be related to by your team-mates, spouse, partner and family?
 - i)
 - ii)

4. How much behavioral modification is required to interact with your team-mates, spouse, partner and family based on the compatibility matrix?

Module 7: Natural Behavior Discovery

Step 3

Review Your Work Life Behavioral Attitudes

Exercise: Review the Work Life Behavioral Attitudes in Your Workplace Report and answer the following questions.

1. How are you currently living out these key attitudes in your work life?

2. Identify 3 ways these attitudes have impacted your life and workplace performance to date.

1.

2.

3.

3. By having greater clarity of these attitudes, identify up to 3 changes you could make in your decision-making.

1.

2.

3.

Module 7: Natural Behavior Discovery

Step 4

Review Your Workplace Insights

Exercise: Review the Workplace Insights Dashboard in Your Workplace Operations Report and answer following questions. You can review the definitions on the next page.

1. What are 3 insights that you had from this Workplace Insights Dashboard?

- 1.
- 2.
- 3.

2. Identify up to 3 ways you would like to manage these insights for your workplace performance.

- 1.
- 2.
- 3.

Definitions of Workplace Insights

LOW		HIGH
Suspicious, Reflective, Controlling, Fear	Desire to Lead	Accepting, Cooperative, Open, Shares
Confrontational, Insensitive, Poor listener	Relationships	Patient, Caring, Inclusive, Harmonious
Over commits, Lose objectivity, Needs boundaries	Results	Outcomes focused, Price sensitive, Demanding
Balanced Life, Cooperates, Steady	Setting Goals	Opportunistic, Ambitious goals, Drive to succeed
Changes plans, Flexible, Wavers	Pursuing Goals	Committed, Stays to plan, Focused
Track record, Existing solutions, Realistic	New Idea Driven	Invest in new products and transactions, New ideas
Fact sheets, Bullet points, High Level, Unprepared	Detailed	Investigative, Research, Analyze, Structured
Diplomatic, Sensitivity, Vague, Caring, Avoid Conflict	Direct Conversations	Clear, Blunt, Confrontational, Specific, Candid
Stressful, Emotional Fatigue, Avoid	Difficult Conversations	Unemotional, Sets the tone, Cool, Tough
Focused on Own Agenda, Misinterprets What is Said, Does not Understand the Problem	Ability to Empathetically Listen	Shows They Care, Demonstrates Understanding, Hears the Issues Clearly
Procrastinates, Considered, Stability, Cautious	Quick Decision-Making	Fast paced, Bold, Self-assured, Forceful
Collaborative, Team approach, Takes direction	Need for Control	Operate alone, Independent thinking, Liquidity

Module 7: Natural Behavior Discovery

Step 5

Review Your Coaching Report

Exercise: Review your Business DNA Natural Behavior Coaching Report and identify your most significant strengths and struggles in each profile factor for making life and work decisions. In particular focus on the strongest factors with scores over 60 and under 40.

Strength:

- Commanding:
- People:
- Patience:
- Structured:
- Natural Trust:
- Pioneering:
- Risk:
- Creativity:

Struggle:

Module 7: Natural Behavior Discovery – con't

Exercise: Review your Financial DNA Natural Behavior Coaching Report and identify your most significant strengths and struggles for making life and work decisions in each profile sub-factor factor with a score over 60 and under 40 (up to 8 sub-factors).

Strength:

Struggle:

- Sub-Factor 1:
- Sub-Factor 2:
- Sub-Factor 3:
- Sub-Factor 4:
- Sub-Factor 5:
- Sub-Factor 6:
- Sub-Factor 7:
- Sub-Factor 8:

Module 8: Connect to Your Natural Behavior Reports

Exercise: Write a brief response to each of the questions below in the space provided

1. How did you feel about your Natural Behavior Discovery?
2. Do you believe the Natural Behavior Discovery is accurate?
3. What aspects of the report do you agree with / disagree with?
4. Are there any parts of the report you do not understand?
5. Has the Natural Behavior report told you something new about yourself?

Module 8: Connect to Your Natural Behavior Reports

6. Has the Natural Behavior Discovery identified differences you have with others?

7. What do you believe is your greatest behavioral talent (as reflected in your Natural Behavior strengths)?

8. From reviewing your Natural Behavior Discovery, what part of your behavior do you struggle with most?

9. How have you learned to adapt your behavior in key areas of life (e.g. business leadership, career, family)?

10. Have you showed your spouse, partner and family your Natural Behavior Discovery? If so, what do they think?

Module 9: Identify Your Dominant Talents

Step 1

Identify Your Dominant Talents

About Talents:

- “...are any recurring patterns of behavior that can be productively applied are talents.”
- Your talents are the foundation of your success.
- By using your talents you can maximize your life, career, financial performance and overall Quality Life – with less stress.
- Talents you are born with and are “hard-wired” – they are the source of your natural strengths & struggles.

Talents are not:

- Skills which are learned
- Knowledge which is factual or learned from experiences

Exercise: Focusing on the strongest factors (those 40 and under and those 60 and over) in the Natural Behavior Coaching Report, write statements about how each of these can be talents or strengths to maximize performance in your life. Before you write down your Talent Statements note down some key ideas in the space below to order your thoughts.

Key ideas on My Talents are:

Module 9: Identify Your Dominant Talents

Step 2

Talent Statements

My Talent Statements are:

Example: Chris Coddington's Talent Statement:

Take Charge Strategic visioning
ReservedReflection and Interacting one-on-one
Fast PacedHighly objective and results driven
PlannedReliable implementation
Skeptical.....Critical thinking
Pioneering.....Strong drive to achieve goals
RiskTakes appropriate risks
Creativity.....Converts ideas to practical action

Module 10: Identify Your Passion

Step 1

Identify Your Passion

About Passion:

- “Passion is something you desire so intensively that it drives you and is an object of infatuation or enthusiasm. It is why you do what you do.”
- Your Passion will be the source of your greatest energy.
- Consider..... Where is there flow for you? What activities can you repetitively do without stress and you are great at? When have you performed at your best? In what do you want to spend more time?
- Recognize....You may have multiple passions in different areas.
- Consider....What would you be doing if money was not an object?

Exercise: Consider the key subjects, ideas or themes that best describe your passion(s). Complete the **Passion Discovery** exercise and then utilize that information to write a Passion Statement. Before you write down your Passion Statement note down some key ideas in the space below to order your thoughts.

Key Ideas on My Passion are:

Module 10: Identify Your Passion

Step 2

Passion Discovery Exercise

Interest Areas: To what extent do the following make you:

Lose track of time? Feel energized? Feel enthusiastic for long periods? Come up with great ideas? Want to know more?

1 = Not at all 2 = To a small extent 3 = To some extent 4 = To a great extent 5= To an amazing extent		Lose track of time	Feel energized	Feel enthusiastic for long periods	Come up with great ideas	Want to know more	Total Score
		Enter 1-5 Here ↓					
1	Children, families or relationships						
2	Real estate, property development or architecture						
3	Science, technology and innovation						
4	Philosophy						
5	Art, music or literature						
6	Law or Accounting						
7	Politics						
8	People, cultures and societies						
9	Religion or spirituality						
10	The stock market						
11	Animals or the environment						
12	Health						
13	Education and learning						
14	Business and economics						
15	Media or entertainment						
16	Psychology or psychiatry						
17	Fashion						
18	Antiques or collectibles						
19	Entertaining, lifestyle or leisure activities						
20	Sport participation						
21	Other (specify):						

Module 10: Identify Your Passion

Actions You Enjoy: To what extent are you passionate about pursuing each of the following activities?

1 = Not at all 2 = To a small extent 3 = To some extent 4 = To a great extent 5= To an amazing extent		Enter 1 – 5 Here □
1	Helping others	
2	Building Things	
3	Mastering a technical field	
4	Taking risks	
5	Making people's lives better	
6	Planning or organizing	
7	Fixing or working with machines	
8	Investigating	
9	Meeting influential people	
10	Solving problems	
11	Exposing immoral behavior or activities	
12	Working with animals or nature	
13	Traveling domestically / interstate or internationally	
14	Working with numbers	
15	Being creative	
16	Researching information	
17	Having contact with or working in the media	
18	Communicating in writing	
19	Speaking to large groups of people	
20	Coming up with new ideas	
21	Educating others	
22	Experiencing different cultures	
23	Executing projects	
24	Sports	
25	Other (specify):	

Module 10: Identify Your Passion

Step 2

Passion Discovery Exercise (con't)

Passion Discovery Summary

Passion *n.* something that is desired intensely; object of infatuation or enthusiasm

Passion = Interest Areas + Actions You Enjoy

1. People can have multiple passions. Using the preceding exercises and looking at your top scores, what would you say are **your top 3...**

Interest Areas	Actions You Enjoy
1.	1.
2.	2.
3.	3.

2. Reflect on 3 activities or things you could do to build a life using your passions.

- a)
- b)
- c)

Module 10: Identify Your Passion

Step 3

Passion Statement

My Passion Statement is:

Example: Chris Coddington's Passion Statement:

"My primary passion is to provide strategic advice to families and business owners so they can make empowered financial decisions from the inside out based on knowing the core of who they are. I am also passionate about recreation (especially tennis and skiing), bridge and reading books about people, families and business."

Module 11: Discover Your X Factor (Unique Gift)

Step 1

X-Factor Discovery

About X-Factor Discovery:

Your X-Factor reflects what you are uniquely gifted to be great at (your talents) and what you love to do (your passion).

- This is your Unique Gift that no one else has.
- It does not reflect your doing in terms of a traditional role description. Rather, your X-Factor reflects the unique magic or formula that you bring to the table.
- What do you do that is difficult for others? What do others think? Where do you stand-out in the crowd? When can you play a role of significance?
- Consider...When are you the most motivated? When are you the most productive? Where do you believe you could have never-ending improvement?

Exercise: Consider how your talents and passions can be combined into your X-Factor which reflects your Unique Gift. Write a statement of your X-Factor. Before you write down your X-Factor Statement note down some key ideas in the space below to order your thoughts.

Key Ideas on My X-Factor are:

Module 11: Discover Your X-Factor (Unique Gift)

Step 2

X-Factor Statement

My X-Factor Statement is:

Example: Chris Coddington's X-Factor Statement:

"My X-Factor is a Wealth Mentor who guides people to achieve personal clarity by providing highly objective solutions to enable them to reach their maximum potential."

2. Discovering Your Authentic Identity and Life Purpose – Your “Being”

“People who labor all their lives but have no purpose to direct every thought and impulse are wasting their time – even when hard at work.” – Marcus Aurelius, Meditations (translated by Gregory Hayes)

Modules 12 to 16: Life Purpose

Life Purpose:

Purpose is what provides the overall foundation and structure for your life. It governs the life, work and financial decisions you will make. It also represents your calling in life, the very essence of your existence, and will become why you do what you do.

Foundational to your life purpose is discovering your identity as this reflects where you excel, can stand-out and also be significant

Benefits of Discovering Your Life Purpose:

- Being able to Live with Meaning
- Having goal clarity
- Developing an understanding of the purpose of money in your life
- Enabling commitment to long term life, work and financial decisions
- Choosing your ideal career and clients
- Building meaningful relationships based on the right foundation

Directions:

1. Use the Life Purpose Worksheet as a directional framework to help liberate your feelings and thinking about your life purpose
2. The Natural Behavior Coaching Report will give you insights on your dominant talents
3. The Quality Life Planning Report will provide you with an assimilation of your choices on passions, vision and values. In addition, you can complete the more detailed exercises contained in this Workbook

Modules 12 to 16: Life Purpose Discovery

The 4 Additional Steps to Discovering Your Life Purpose and Identity following Discovering Your X-Factor (Unique Gift) in the previous section

**Module
12/13**

**Dream Your Vision and Set the
Mission**

**Module
14**

Identify Your Values

**Module
15**

Articulate Your Life Purpose

**Module
16**

**Express Your Identity Through
Purpose**

My Life Purpose Worksheet

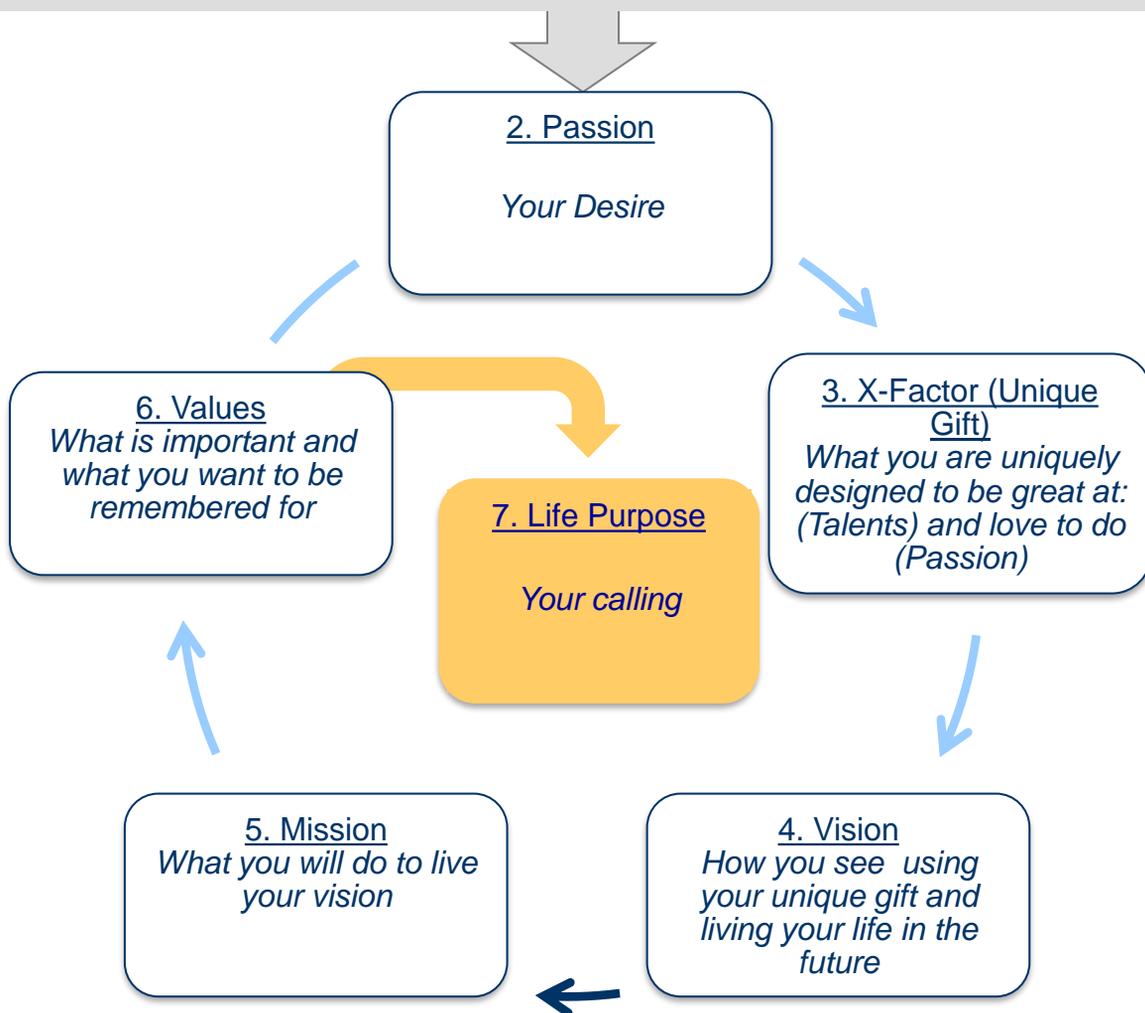
1. Natural Behavioral Talents [Sourced from the Natural Behavior Discovery]

My Performance Strengths

- 1.
- 2.
- 3.
- 4.
- 5.

My Performance Struggles

- 1.
- 2.
- 3.



Module 12: Dream Your Vision

Step 1

Identify Your Vision

- Vision is the mental image that you have for your life that has been produced by your imagination, ideas, concepts, and anticipation.
- With a clearly defined vision, you can set the direction and scope for how you will use your unique gift.
- Consider...What is your vision for your life? Where do you expect to be in 1 year, 5 years, and 20 years time? What do you expect to be doing? What does it look like? Who do you expect to be with?
- Consider... What is your perfect day?

Exercise: Consider your career, wealth, income, family, where you would like to live and what lifestyle you would like to be enjoying. Complete the **Vision Discovery Exercise** and then use that information to write a Vision Statement outlining the vision for your life. Before you write down your Vision Statement note down some key ideas in the space below to order your thoughts.

Key Ideas on My Vision are:

Module 12: Dream Your Vision

Step 2

Vision Discovery Exercise

Your Desired Future: Through the following questions consider the broad practical boundaries for your life.

Question 1

Which of the following options would you choose today?

		Tick One Below ↓
1	Keep on doing what I already do well, but change the environment	
2	Change the work I do but stay in the same environment	
3	Change my career completely	
4	Change nothing in my life	

Question 2

How many hours per week do you see yourself working? (Please check one for each time frame.)

		currently	In 1 year	In 5 years	In 10 years
1	10-20 hours				
2	20-30 hours				
3	30-40 hours				
4	40-50 hours				
5	More				

Module 12: Dream Your Vision

Question 3

In considering your finances, how much capital is enough? (Tick one below)

1	\$500,000 - \$2,000,000	
2	\$2,000,000 - \$5,000,000	
3	\$5,000,000 - \$10,000,000	
4	\$10,000,000 - \$25,000,000	
5	More than \$25,000,000	

Question 4

Please indicate your plans for retirement.

In how many years do you intend to retire? 1 = 0-2 years 2 = 2-5 years 3 = 5-10 years 4 = 10-20 years 5 = never	
What net (after tax) disposable income in today's dollars will you want in retirement to maintain your lifestyle?	\$ ye arl y
What amount of capital do you want at retirement to maintain your lifestyle?	\$
Please answer the following questions using the following scale: 1 = Not at all 2 = To a small extent 3 = To a moderate extent 4 = To a great extent 5 = To a very great extent	Enter 1-5 Here ↓
How important is it for you to achieve these goals?	
Are you prepared to retire later to achieve these financial goals?	
Are you prepared to make sacrifices to achieve these goals?	

Module 12: Dream Your Vision

Life Dreams: Through the following questions identify at a broad level the possibilities of what your ideal life to look like.

Question 5

To what extent are the following activities ones you want for your life?

1 = Do not agree 2 = Agree to a small extent 3 = Agree to some extent 4 = Agree to a great extent 5= Agree to an extraordinary extent	Enter 1-5 Here ↓
1. Being married	
2. Having children	
3. Being an excellent parent	
4. Traveling on at least one international vacation per year	
5. Traveling on at least one domestic vacation per year	
6. Having a vacation home	
7. Writing your life story	
8. Writing a best seller	
9. Owning your own business	
10. Taking your business international	
11. Living in an international location	
12. Winning a prestigious award for an invention	
13. Being number one in your field	
14. Being a sought after public speaker	
15. Being a recognized business leader	
16. Influencing people internationally	
17. Writing a screen play	
18. Starting your own non-profit	
19. Having a strong network of friends	
20. Playing sports	
21. Being a fashion designer	
22. Being a successful actor	
23. Volunteering extensively with non-profits	
24. Being a successful musician	
25. Going back to school for further education	
26. Moving to a large city	
27. Moving to the country	
28. Going into a helping profession or ministry	
29. Teaching people	
30. Other (specify):	

Module 12: Dream Your Vision

Question 6

Assume you have vast personal wealth. What are up to 10 ways you would use this wealth?

1.	6.
2.	7.
3.	8.
4.	9.
5.	10.

Question 7

What does “having it all” mean to you?

	1 = Do not agree 2 = Agree to a small extent 3 = Agree to some extent 4 = Agree to a great extent 5 = Agree to an extraordinary extent	Enter 1-5 Here ↓
1	Have the basics of life and no real worries	
2	Working in a successful business I am passionate about	
3	Having enough money so I don't have to work	
4	Being healthy	
5	Being a successful entrepreneur	
6	Being able to give back to the community	
7	Having many friends who trust me	
8	Having unconditional love and support from my family	
9	Clarity about the decisions in my life	
10	Opportunity to travel extensively	
11	The ability to work in 2 or more vocations	
12	Having the time to do what is important to me	
13	To have recognition and status in the community	
14	To feel that I am valued	
15	To be able to give my children all the opportunities that I didn't have	
16	To be generous with my time, talents and money	
17	To invest myself in the lives of others	
18	Other: (specify)	

Module 12: Dream Your Vision

Step 2

Vision Discovery Exercise

Summary

Vision *n.* something that is or has been seen; a mental image produced by the imagination; idea; concept; anticipation

Vision = Your Desired Future + Life Dreams

1. In capturing your vision for the future, what would you like your life to look like in the next 1, 5, and 10 years? Using the preceding exercises and looking at your top scores, what would you say are your top 3...

Your Desired Future	Life Dreams
1.	1.
2.	2.
3.	3.

2. Reflect on 3 specific changes you need to make to your life so that you are able to move towards your vision.

(1)

(2)

(3)

Module 12: Dream Your Vision

Step 3

Vision Statement

My Vision Statement is:

Example: Chris Coddington's Vision Statement

"I will play a leadership role in the financial services community through the establishment of an advisory firm that implements a wealth management process to guide people to make decisions from the inside out."

Module 13: Set The Mission

Step 1

Identify Your Mission

About Mission:

- Your Mission is a declaration of how you will go about achieving the vision for your life. The mission will include the structures, tools, processes, and people involved.
- Consider...How will you pursue your vision? How are you equipped to do it? How does it relate to your skills, knowledge, talents, and passions?
- Consider...How do you think the world will see you? What will you be seen doing on a day to day basis?

Exercise: Write a statement of your mission, documenting how you will go about achieving your vision. Before you write down your Mission Statement note down some key ideas in the space below to order your thoughts.

Key Ideas on My Mission are:

Module 13: Set The Mission

Step 2

Mission Statement

My Mission Statement is:

Example: Chris Coddington's Mission Statement

"My mission is to be committed to delivering on my philosophies and values by providing people with the necessary strategic advisory services, behavioral assessment tools and educational programs to enable them to build a balanced life and maximize their financial potential.

I know from this platform, many people will be able to achieve improved results on a consistent basis through being able to make more empowered wealth creation decisions. Hopefully, this will also reach many young people so they get the guidance they need earlier to live their dreams and discover some realistic pathways for doing so."

Module 14: Identify Your Values

Step 1

Identify Your Values

- Values include the life foundations, principles, standards, or qualities considered fundamental, worthwhile, important or desirable to live a life of worth, importance, merit, and eminence.
- Consider...What are you about? What gives you joy? What do you want to be remembered for? What is the legacy of your life?
- Consider...To what extent do you live by your values?

Exercise: What are the most significant values for your career, investments, relationships, and overall life decisions?

Complete the **Values Discovery Exercise**. Using that information write a Values Statement (or list the key words that make up your values). Before you write down your Values Statement note down some key ideas in the space below to order your thoughts.

Key Ideas on My Values are:

Module 14: Identify Your Values

Your Life Focus

Question 1

Listed below are different motivations for how you live your life. Indicate how important each one is to you:

	1=Not at all Important 2=Not Important 3=Important 4=Very Important 5=Extremely Important	Enter 1 – 5 Here ↓
1	Reliability	
2	Appearance	
3	Achievements	
4	Altruism	
5	Honesty	
6	Relationships	
7	Health	
8	Privacy	
9	Personal growth	
10	Loyalty	
11	Risk Taking	
12	Security	
13	Aesthetics	
14	Respecting Authority	
15	Creativity	
16	Competition	
17	Freedom	
18	Independence	
19	Integrity	
20	Leisure	
21	Meaningful work	
22	Order	
23	Pleasure	
24	Service	
25	Other (please specify):	

Module 14: Identify Your Values

Your Life Legacy

Question 2

What do you want to be remembered for?

	1=Not at all Important 2=Not Important 3=Important 4=Very Important 5=Extremely Important	Enter 1-5 Here ↓
1	As someone who got results	
2	As someone who made a difference	
3	As someone that everyone liked	
4	As someone who was adventurous	
5	As someone who was kind	
6	As someone who was successful	
7	As someone who was very wealthy	
8	As someone who loved people	
9	As being a great parent	
10	As being a great spouse	
11	As being the best in my field	
12	As someone who was great fun to be with	
13	As someone who found their passion and did it	
14	As someone who was always striving to learn	
15	As someone who was very wise	
16	As being the most innovative in their group	
17	As being a great friend	
18	Other (please specify):	

Module 14: Identify Your Values

Step 2

Values Discovery Exercise

Summary

Values include the life foundations, principles, standards, or qualities considered fundamental, worthwhile, important or desirable to live a life of worth, importance, merit and eminence.

Values = Your Life Focus and Life Legacy

1. Using the responses in questions 1 and 2 above, identify 5 of your core values.
2. Rate from 1 to 10, to what extent you currently have these values in your life. (Note: 10 is highest.)

Step 1. Values	Step 2. Ratings (from 1 – 10)
1.	
2.	
3.	
4.	
5.	

3. Having completed the exercises above, what are 3 ways your future financial decisions will reflect your life values?

(1)

(2)

(3)

Module 14: Identify Your Values

Step 3

Values Statement

My Values Statement is:

Example: Chris Coddington's Values Statement:

“The foundation of my life is to be remembered as a person who can be relied upon to honor my commitments and to keep my word. Also, it is important that people feel I have sought to firstly understand who they are, and believe my intention to create a mutual relationship. Further, I believe in helping those people who are prepared to learn and better themselves.”

Module 15: Articulate Your Life Purpose

Step 1

Identify Your Life Purpose

About Life Purpose:

- Life Purpose is the core foundation and values by which you live your life. This is the framework from which all your Quality Life Goals will be set and life and financial decisions will be made. It also represents your calling in life, the very essence of your existence, and will become why you do what you do.
- Consider...What were the key themes uncovered from discovering your talents, passions, unique gift, vision, mission, and life foundations? Purpose is what provides the overall foundation and structure for your life.

Exercise: Based on your talents, passion, unique gift, vision, mission, and values, write a Life Purpose Statement summarizing the purpose for your life. Before you write down your Life Purpose Statement note down some key ideas in the space below to order your thoughts.

Key Ideas on My Life Purpose are:

Module 15: Articulate Your Life Purpose

Step 2

Statement of Life Purpose

My Life Purpose Statement is:

Example: Chris Coddington's Life Purpose Statement

"I will firstly honor my family, friends, and team members in everything that I do. I will liberate and guide people worldwide to Live with Meaning and maximize their human potential. I will help people understand their innate behaviors, financial preferences, and their life plans. I will educate and guide many people to uncover their unique talents, aptitudes, and interests in order that they may build from the inside-out a balanced life."

My Life Purpose: Chris Coddington

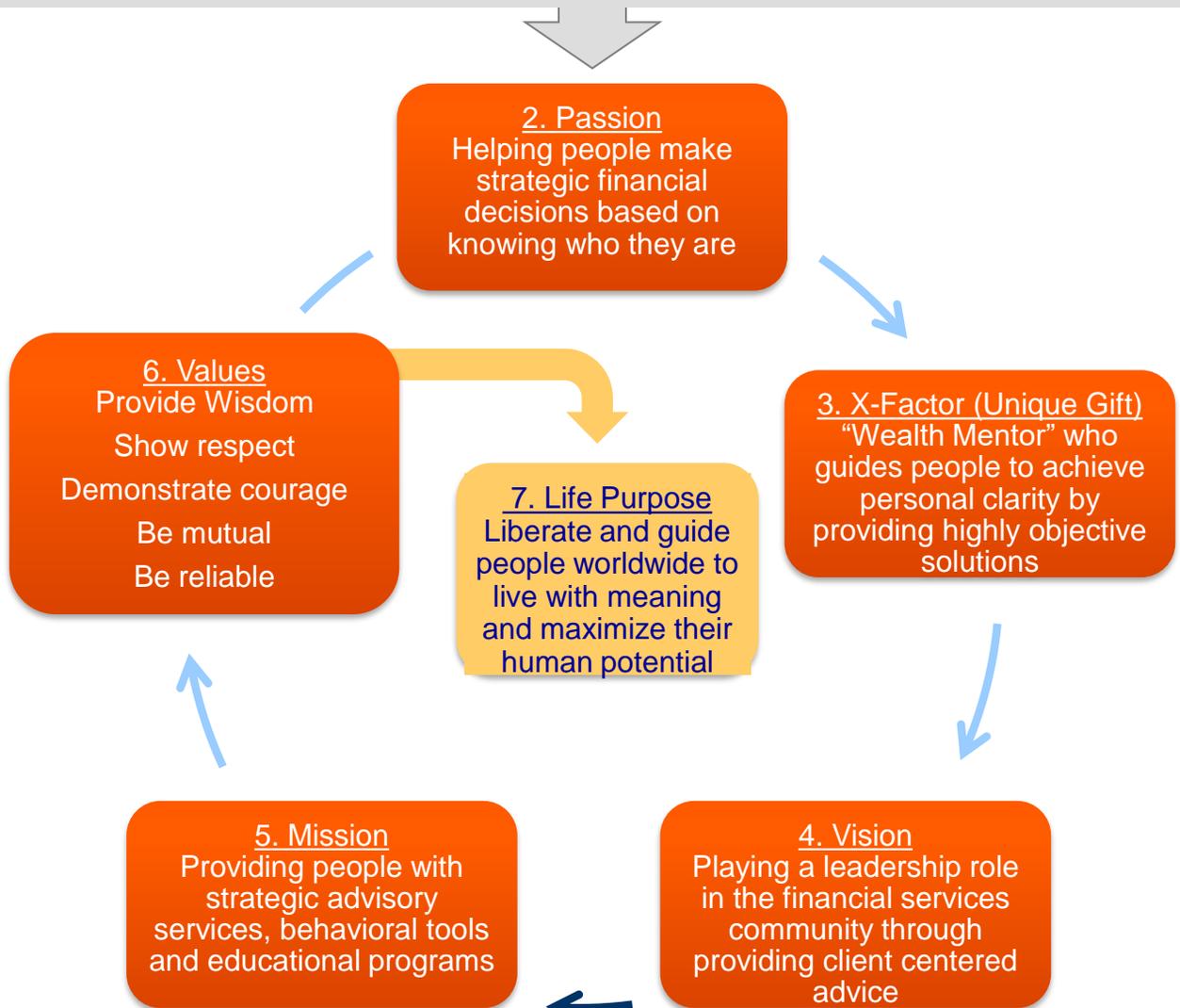
1. Natural Behavioral Talents

My Performance Strengths

1. Strategic visioning
2. Reliable implementation
3. Competitive and follows through
4. Bold decision-maker
5. Converts ideas to practical action

My Performance Struggles

1. Business networking
2. May be too driven
3. Minimizing the risks



My Life Purpose Worksheet

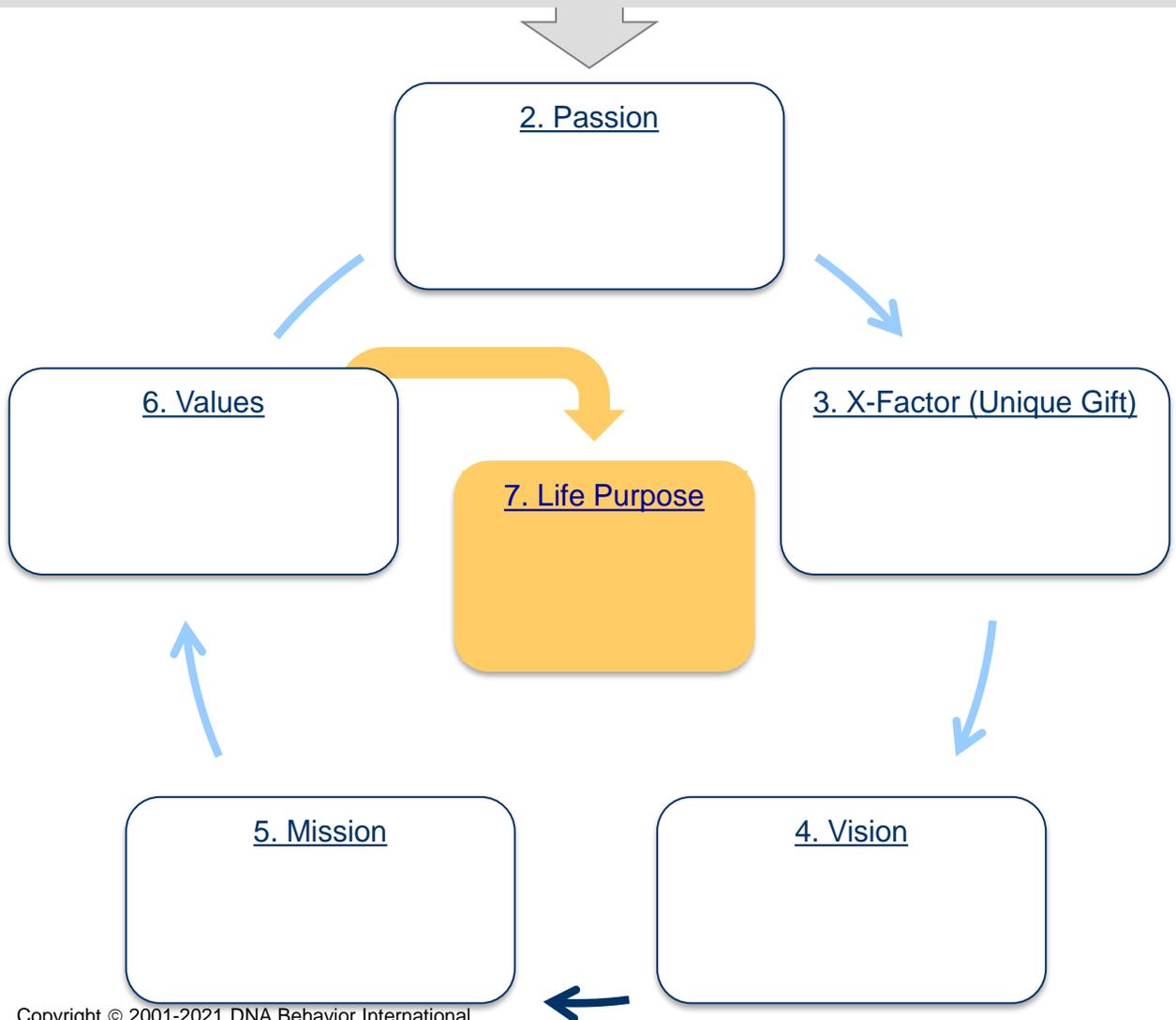
1. Natural Behavioral Talents

My Performance Strengths

- 1.
- 2.
- 3.
- 4.
- 5.

My Performance Struggles

- 1.
- 2.
- 3.



Module 16: Express Your Identity Through Purpose

Exercise: You will ultimately have a primary identity and then a number of sub-identities that align with the multiple areas of your life. Based on your Life Lines, X-Factor and Life Purpose Discovery identify your “Being” for wherever your life is at now. Your Being should be more refined than what you may have written down following completion of your Life Lines in Section 1. Note, as you get older and go through more life experiences some of your Being may evolve further.

1. Doing

Functions
Roles or Jobs
Skills
Education
Activities
Heritage
Social Status

2. Becoming

Drivers
High Performance
Areas of Higher Confidence
Stand-Out Talent
Accomplishment

3. Being

- Impactful
- X-Factor
- Passion
- Calling, Purpose
- Experiential
- Flow
- Distinguishing
- Values, Governs choices
- Pride

Module 16: Express Your Identity Through Purpose

Chris Coddington's Identity to Age 39

1. Doing

Tax Advisor
Investor
Life Guard
Golfer
Australian

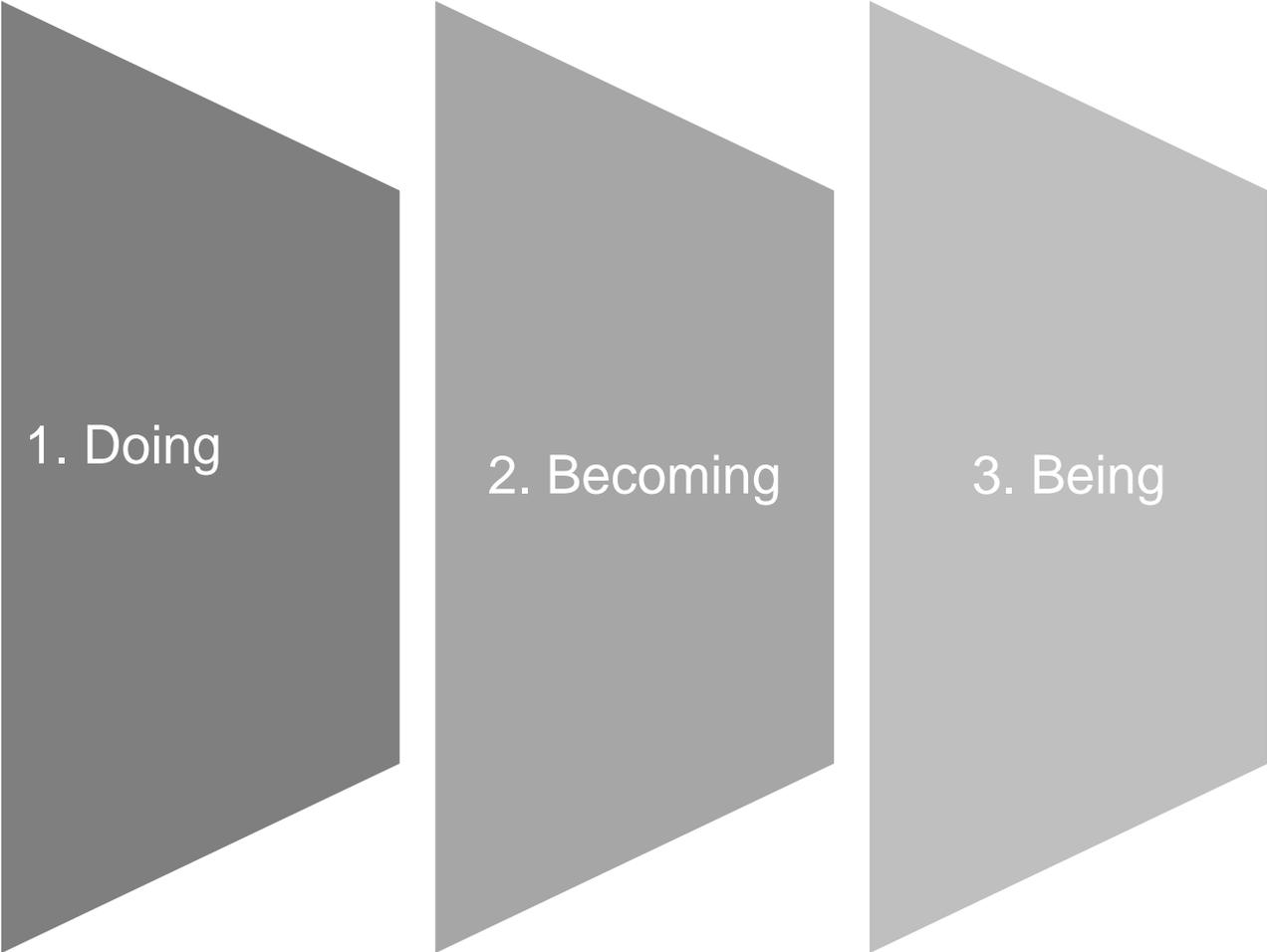
2. Becoming

- Investment Banker
- Trusted Financial Advisor
- Entrepreneur
- Global Citizen

3. Being

- Wealth Mentor
- Family Dynamics Navigator
- Behavioral Finance Specialist
- Serial Entrepreneur

Your Identity Make-Up



1. Doing

2. Becoming

3. Being

3. Living Your Authentic Identity With Impact – Behavioral Modification

“In life, the first thing you must do is decide what you really want. Weigh the costs and the results. Are the results worthy of the costs? Then make up your mind completely and go after your goal with all your might.” – Alfred A. Montapert

Module 17: Define Your Quality Life Based on Your Identity

Exercise: How do you define a Quality Life? Write your own definition based on who you are.

The question is how will you live your most meaningful and significant life? Your Life Purpose and X-Factor are foundational. However, there is more to it.

A balanced life is not the same for all of us. This is why we have re-framed it to a Quality Life. This is a more principles-based and private statement of how you will go about living your life. It does not need to be publicly shared beyond your sounding board like your Identity would be. Overall, having a clear statement of what a Quality Life means for you, along with knowing your identity, will help you make better decisions more frequently.

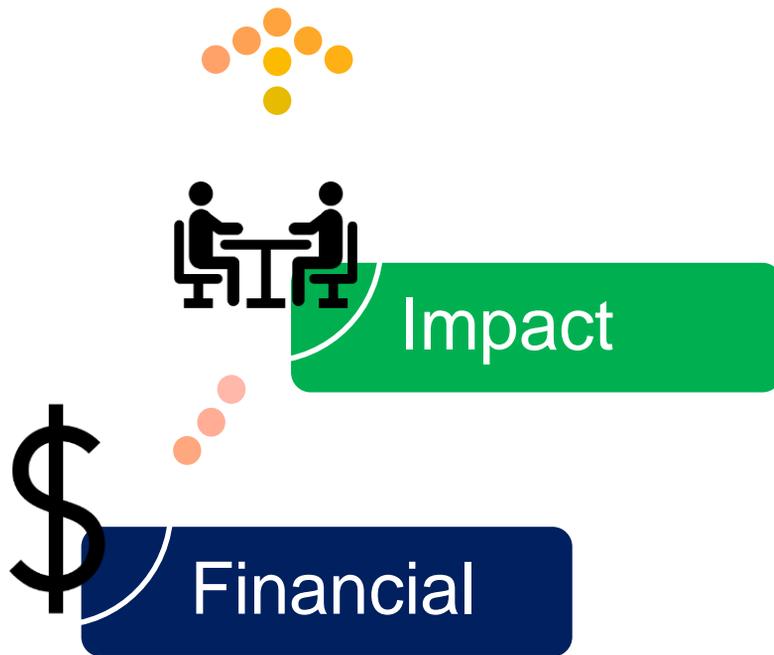
A Quality Life

“A “quality life” means successfully integrating finances into a balanced life, and in so doing, having the courage to live according to your unique design, in harmony and without regret.”

– *Hugh Massie*

A Quality Life means...

Module 18: Measuring Your Return on Identity



Exercise: Define up to 5 “Moonshot” numbers for how you will define life and business success based on your impact. How will you measure your Identity based on some action or using your X-Factor? (Consider your impact on people, the experiences you create, contribution and service).

For some the benchmark or “score card” is financial wealth and material trappings such as international vacations, cars, antiques etc. Others may consider the number of friends they have, or the number of people’s lives that they positively impact through their work, the experiences they create, or how much they give to the community. How about you?

- 1.
- 2.
- 3.
- 4.
- 5.

Module 19: Imagine and Draw a Picture of Living Your Quality Life

The Painted Picture for Clients

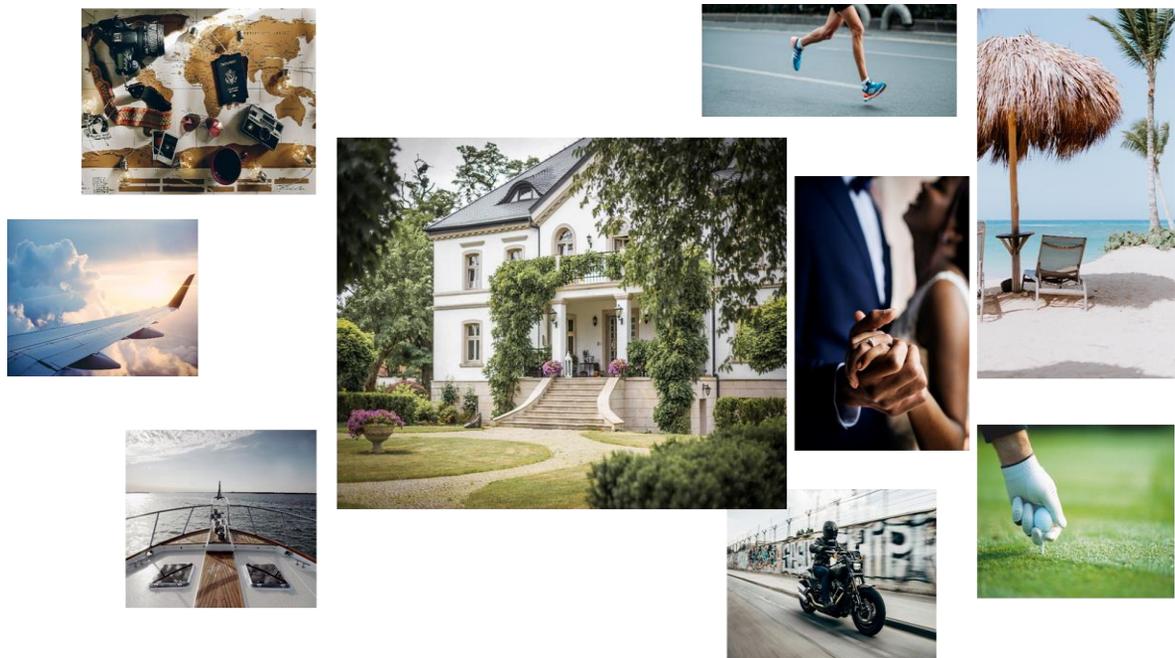
Your Wealth Mentor asks you to imagine:

Transforming your life and finances in 3 years time whereby you are able to live a meaningful life and have sufficient planned free time to do what you enjoy with those who you love, and have sufficient capability to earn the income to live the life of your dreams.

What impact would this have on you and your family living an improved Quality Life?

For Wealth Mentors:

It is key you discover your own Life Purpose and build a Quality Life to be able to guide clients on the journey and to increase focus in building your business.



Identity Behavioral Modification Commitments

What Changes Will Your Make to Change Your Future Reality?

The Challenge:

**YOU
are in the way of
your own
performance**

Lack of Direction
Relationship Gaps

Fear
Poor Choices



The Change Opportunity

Performance, Impact, Money
Energy, Quality Life

- Right Life Direction
- Engagement of Others
- Confidence
- Wisdom
- Resilience
- Optimism

17

Module 20: Behavioral Modification Commitments

Exercise: Now that you know your Identity and what a Quality Life means for you, the next step is to determine what **behavioral modification** you will make to align your life and in what time-frame. This is what you will need to be held accountable to. Address the following questions.

1. What changes are you going to make to be that person and reach your potential?
2. Where will you find significance in your life? When you do, you will have a place of importance and feel valued - therefore feel less emotional, be less reactionary.
3. How will you project yourself going forward?
4. What strengths will you use, and what struggles will need to be managed so you get out of your own way?

Module 20: Behavioral Modification

5. What activities or functions will you do more of and less of?

6. Who should you be interacting with in the future that are a positive influence, and/or you can be a positive influence on?

7. How will you interact with and/or work with others? How will you show up differently in relationships, in teams and in your family?

8. What are you doing to maintain your energy at a high level? Or, to ensure your energy is not drained?

9. How will your decisions change?

Hugh Massie and DNA Behavior



About Hugh Massie

Hugh is a “reformed accountant” who has become a Titan CEO, Behavioral Solutions Architect, Money Energy Pioneer, High Stake Decision Orchestrator, Behavioral Finance Trailblazer, award-winning author, experiential speaker, devoted dad and keen golfer

Since 2001, as the Chairman and Founder at DNA Behavior International he spends his time traveling the world empowering advisors, leaders, families and individuals to unlock their identity in order to accelerate dramatic change while growing relationships. In the process, He helps them discover how unknown behaviors which intensify through unmanaged differences, money attitudes, pressure and emotions derail performance.

Hugh’s real-world practical application of behavioral insights and the mastery of the energy of money, blended with strong financial skills, gives him the unique capability to design a variety of universally applicable human performance apps. Further, with his unique talents he also serves as a corporate strategist, coach, mentor, trainer, board member, keynote speaker and author. This Behaviorally SMART approach helps him convert strategic vision to goals and practical reality to accelerate dramatic change while growing relationships.

Since 2001 using the Financial DNA® and Business DNA® platforms he pioneered, his solutions have impacted millions of people in over 125 countries, including investors with assets from \$1 to over \$1billion, over 20,000 advisors and leaders of more than 5,000+ businesses.

Hugh is an author, including “Financial DNA – Discovering Your Unique Financial Personality for a Quality Life” (John Wiley 2006 and 2021) and then "Leadership Behavior DNA - Discovering Your Natural Talents and Managing Differences" (Freedomstar Media, January 2020), with co-author Lee Ellis. He has also written or contributed to many other publications and presented extensively as a keynote speaker about human performance acceleration through revealing and managing behavioral insights and money attitudes.

Also, Hugh is a member of Titan CEO 100 and been a Global Board Member of Entrepreneurs Organization. Further, he is an Advisory Board member of a range of other businesses.

Hugh enjoys golf, tennis, skiing, cricket, travel to new places for adventure, business and history reading. He lives in Atlanta with his wife Jennifer, daughter Kathryn, and son Hugh.

Disclaimer and Contact Information

Disclaimer

The purpose of the DNA Behavior (Financial DNA[®] and Business DNA[®]) Discovery Processes, products and related application tools is to assist in the identification of a person's identity, financial behavior, communication style and differences to others. The DNA Discovery Processes are not professional psychological instruments and should not be used to identify, diagnose or treat psychological, mental health, and/or medical problems. Additionally, if used to evaluate personnel, the user should seek adequate legal counsel to ensure compliance with applicable local, state and federal employment laws. The user assumes sole responsibility for any actions or decisions that are made as a result of using these aids to self-discovery. By using the DNA Behavior Discovery Processes, you expressly waive and relinquish any and all claims of any nature against DNA Behavior International, affiliated companies, and/or their employees, arising out of or in connection with the use of these products.

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