



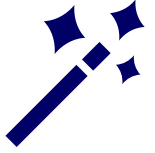
**DNA Behavior**<sup>®</sup>  
Behavior and Money Insights

# Quality Life Planning Discovery



# Quality Life Discovery: Identify Your Talents

Using your traits from your Natural Behavior discovery, use the space below to identify your behavioral talents. (See Unlocking Guide for more descriptions)



**My Talent Statements are:**

**Example: Chris Coddington's Talent Statement:**

*Take Charge ..... Strategic visioning*  
*Reserved .....Reflection and Interacting one-on-one*  
*Fast Paced .....Highly objective and results driven*  
*Planned .....Reliable implementation*  
*Skeptical.....Critical thinking*  
*Pioneering....Strong drive to achieve goals*  
*Risk .....Taking appropriate risks*  
*Creativity.....Creative problem solving*

# Quality Life Discovery: 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:**

# Quality Life Discovery: Identify Your Passion

**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):						

# Quality Life Discovery: 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):	

# Quality Life Discovery : Identify Your Passion



## 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)

# Quality Life Discovery : Identify Your Passion

*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."*

# Quality Life Discovery : Unique Gift Discovery



## About Unique Gift:

- Your unique gift is what you are uniquely designed to be great at (your talents) and what you love to do (your passion).
- What do you do that is difficult for others? What do others think?
- 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 unique gift. Write a statement of your unique gift. Before you write down your Unique Gift Statement note down some key ideas in the space below to order your thoughts.

**Key Ideas on My Unique Gift are:**



# Quality Life Discovery : Unique Gift Discovery

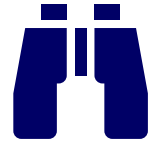


*My Unique Gift Statement is:*

**Example: Chris Coddington's Unique Gift Statement:**

*"My unique gift is guiding people to achieve personal clarity by providing highly objective solutions to enable them to reach their maximum potential."*

# Quality Life Discovery : Dream Your Vision



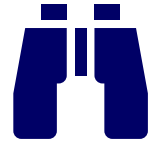
## About Vision:

- 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:**

# Quality Life Discovery : Dream Your Vision



**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?

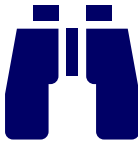
		Tick One Below ↓
1	Keep on doing what I already do well, but change the environment	
2	Change the work I do but stay in the same environment	
3	Change my career completely	
4	Change nothing in my life	

## 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				

# Quality Life Discovery : Dream Your Vision



## Question 3

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

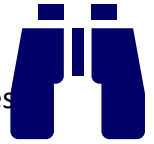
1	\$500,000 - \$2,000,000	
2	\$2,000,000 - \$5,000,000	
3	\$5,000,000 - \$10,000,000	
4	\$10,000,000 - \$25,000,000	
5	More than \$25,000,000	

## 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?	\$                      yearly
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?	

# Quality Life Discovery : Dream Your Vision



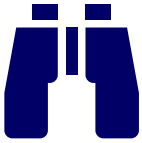
**Life Dreams:** Through the following questions identify at a broad level the possibilities of what your ideal life to look like.

## 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):	

# Quality Life Discovery : Dream Your Vision



## Question 6

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

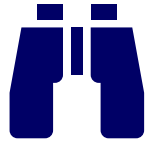
1.	6.
2.	7.
3.	8.
4.	9.
5.	10.

## 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)	

# Quality Life Discovery : Dream Your Vision



## 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.

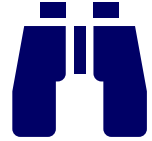
2. Reflect on 3 specific changes you need to make to your life so that you are able to move towards your vision.

(1)

(2)

(3)

# Quality Life Discovery : Dream Your Vision



**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."*



# Quality Life Discovery : Set The 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:**

# Quality Life Discovery : Set The Mission



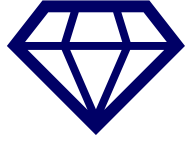
**My Mission Statement is:**

## **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."*

# Quality Life Discovery : Identify Your Values



## About 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:**

# Quality Life Discovery : 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):	

# Quality Life Discovery : 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):	

# Quality Life Discovery : Identify Your Values



## 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)

# Quality Life Discovery : Identify Your Values

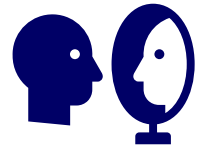


**My Values Statement is:**

**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."*

# Quality Life Discovery : Articulate Your Life Purpose



## About Life Purpose:

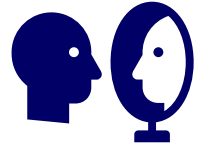
- Life Purpose is the core foundation and values by which you live your life. This is the framework from which all your Quality Life Goals will be set and life and financial decisions will be made. It also represents your calling in life, the very essence of your existence, and will become why you do 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:**



# Quality Life Discovery : Articulate Your Life Purpose



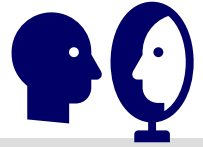
**My Life Purpose Statement is:**

**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."*

# Quality Life Discovery

My Life Purpose: ex: Chris Coddington



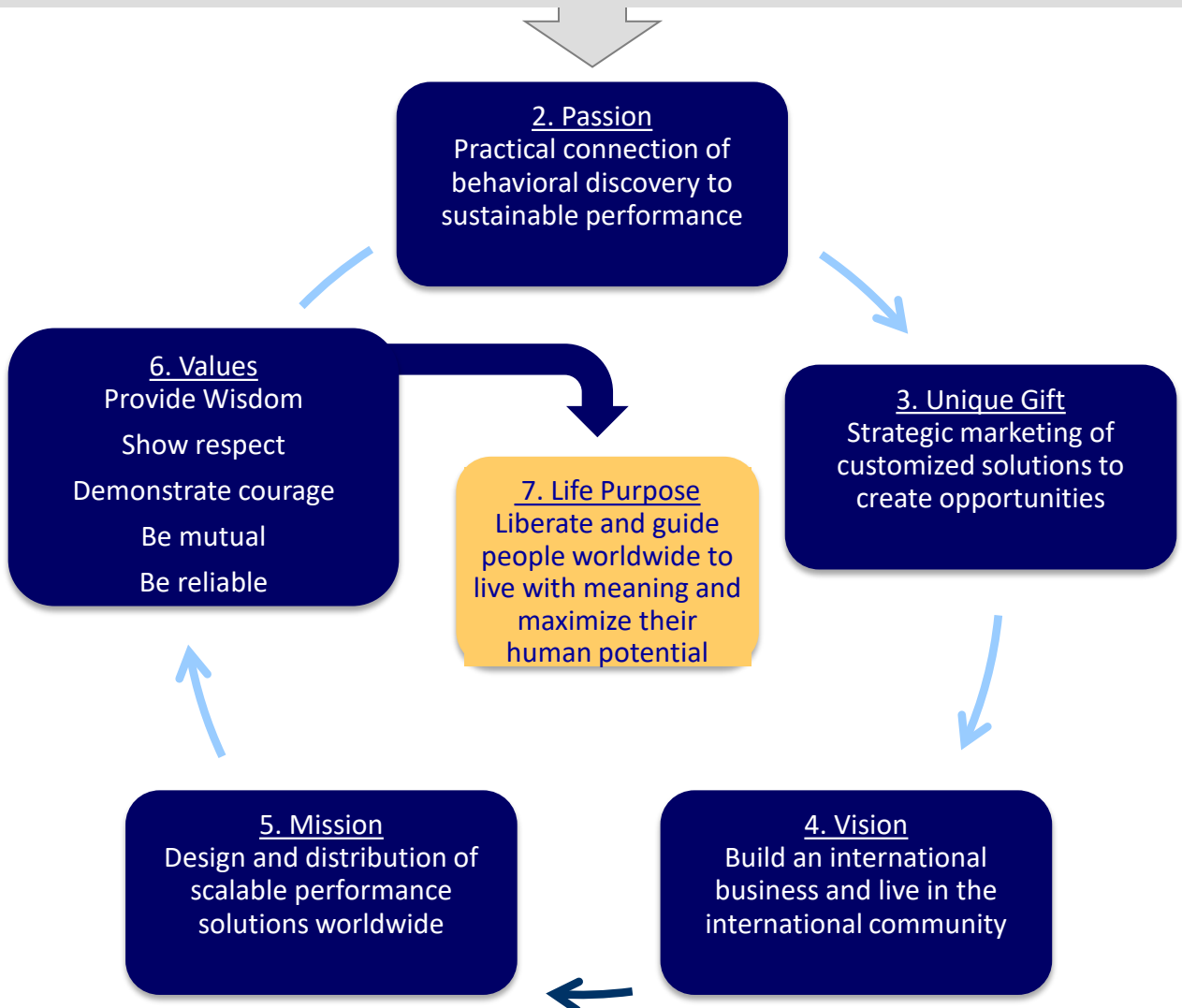
## 1. Natural Behavioral Talents

### My Performance Strengths

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

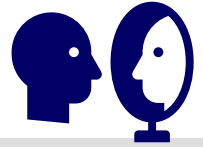
### My Performance Struggles

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



# Quality Life Discovery

## My Life Purpose:



### 1. Natural Behavioral Talents

#### My Performance Strengths

#### My Performance Struggles

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

- 1.
- 2.
- 3.

