

# Financial DNA® Natural Behavior Discovery

## Summary Report for Ray Glicksohn

Providing key behavioral insights into how you naturally approach the financial planning process.



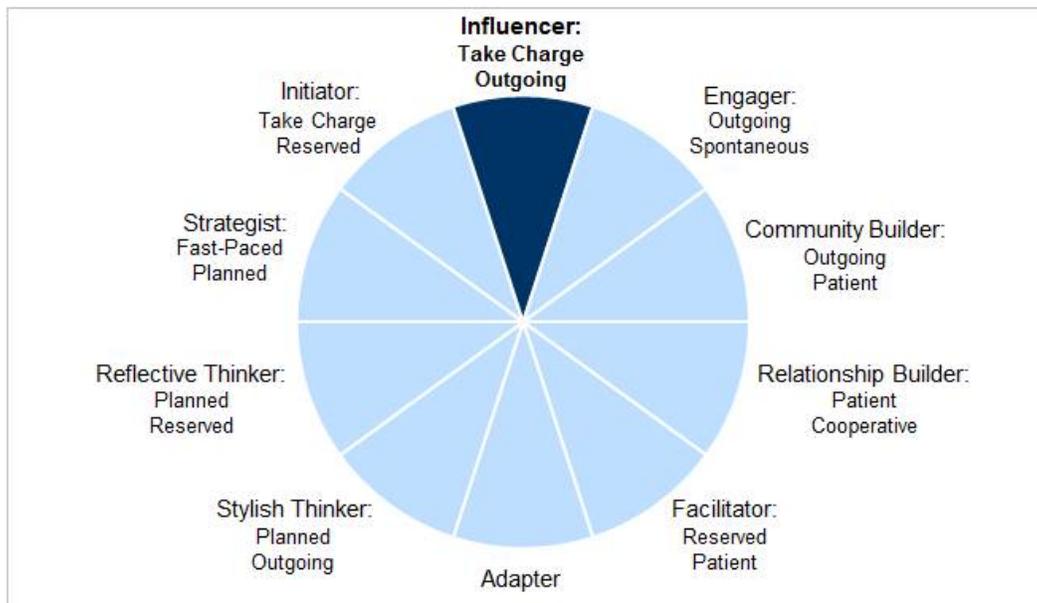
Based on your Completion of the Natural Behavior Discovery on: May 07, 2009

Financial DNA Natural Behavior Summary Report for: Ray Glicksohn  
 Your DNA Natural Behavior Style: Influencer

*Influencers usually like to take all opportunities for being in front of people and to be at the center of decision-making. They are able to engage and motivate people into action through their powerful verbal talents and overall level of enthusiasm. They will wholeheartedly invest time and effort into developing others and their personal performance towards goals, particularly strategies that they see significant potential in.*

**Summary of DNA Natural Behavior - The 10 Unique Styles**

The graph below shows the 10 DNA Natural Behavior Styles in relation to one another. Your DNA Natural Behavior Style is highlighted in the graph. This will help you to see your natural behavior similarities and differences to other styles more clearly.



Based on your factor scores, your 2 strongest behavioral factors are:

- \* **Outgoing** - Enjoys new ideas, expresses view, uses a networking approach
- \* **Spontaneous** - Free-flowing, high level approach, instinctive

The behavioral biases associated with these factors are:

- \* **Outgoing** - Herd Follower: Tends to stampede into investments in exuberance and out in fear
- \* **Spontaneous** - Instinctive: In adversity tends to make decisions quickly and emotionally based on instinct

Your Performance Strengths	Your Performance Struggles
<p><i>Knowing your strengths, you can increase your performance potential.</i></p> <ul style="list-style-type: none"> <li>• Good at meeting people</li> <li>• Likes to make a good impression on others</li> <li>• Able to promote</li> <li>• Flexible, willing to adjust</li> <li>• Works well with broad concepts</li> </ul>	<p><i>Knowing your struggles, you can reduce your performance impediments.</i></p> <ul style="list-style-type: none"> <li>• Strong need for approval from others</li> <li>• May be too transparent, too uninhibited</li> <li>• May juggle too many ideas or tasks</li> </ul>

### Your Performance Environment Keys

*The Performance Environment Keys indicate the required setting for your maximum performance.*

- Remember my need for fun and/or excitement
  - Invest time in building our relationship
    - Tell me who is involved
    - Allow me plenty of freedom
- Use graphics and verbal communications

### Quality Life Behavioral Attitudes

Your natural motivations, desires and approach to building a Quality Life are often influenced by the strongest traits in your natural behavioral style. Based on the two strongest behavioral factors in your Natural Behavior, your primary Quality Life Attitudes are summarized in the table below.

	Quality Life Attitude 1 Outgoing Factor	Quality Life Attitude 2 Spontaneous Factor
Quality Life Outlook:	Fun loving	Flexibility
Wealth Creation Philosophy:	Building lifestyle	Flamboyant
Financial Attitude:	Generous	Spend it
Financial Goal Setting Approach:	People first	Needs boundaries
Activity Passion:	Communication	Improvisation
Values:	Enjoyment	Freedom
Planned Giving Motivation:	Making connections	Fun
Strength:	Openness	Instinctive
Blind-spot:	Over spends	Impulsive
Communication:	Verbalize	Provide broad facts

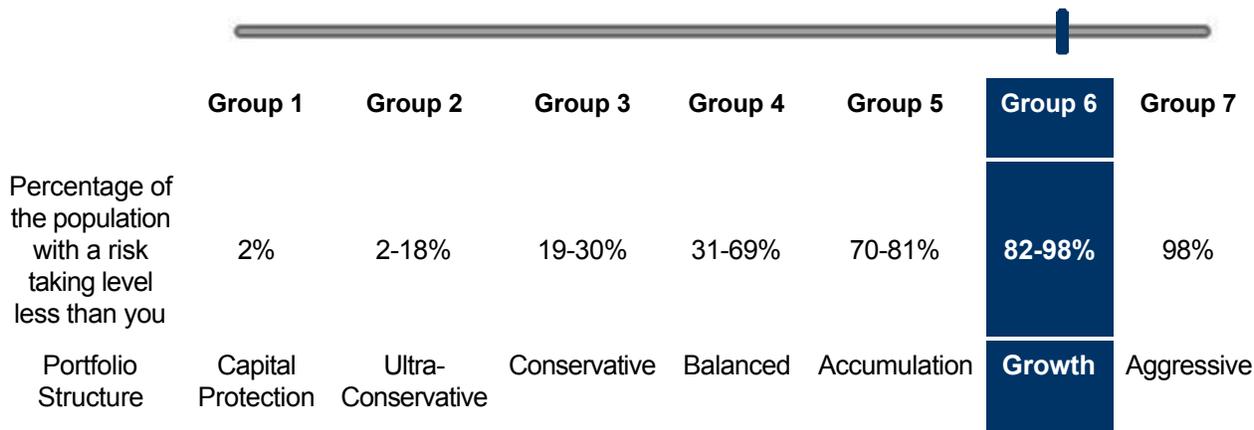
## Financial Planning Insights

Based on combinations of your behavioral factors, your natural approach to the financial planning process is set out in the table below.

Insight	L/M/H	Population% (0-100%)
Sets the Agenda for the Planning Process	HIGH	88%
Patiently Builds Long Term Relationships	MEDIUM	54%
Focus on Bottom Line Results	MEDIUM	42%
Risk Propensity for Taking Chances	HIGH	92%
Risk Tolerance for Living With Losses	HIGH	92%
Sets Goals for Ambitious Plans	HIGH	90%
Pursues Goals to Stay Focused on the Plan	MEDIUM	46%
Comfort to Deal With Change and Make Decisions	HIGH	95%
New Idea Driven for Investing in Solutions and Products	HIGH	73%
Financially Organized and Follows Budgets	LOW	2%
Need for Information, Research and Analysis	LOW	1%
Spending Desire on Lifestyle Items	HIGH	99%
Need for Control Over Financial Planning Decisions	MEDIUM	50%

## Natural Behavior Investment Portfolio Parameters

Your standard Natural Behavior Investment Portfolio group for determining the structure of your investment portfolio is indicated below. Your Investment Portfolio Group has been determined based on the blend of your natural behavior Risk Propensity and Risk Tolerance as summarized in the table above. However, your actual Risk Propensity and Risk Tolerance for making investment decisions will be influenced by your current financial capacity and preferences that have evolved from circumstances, experiences and education.

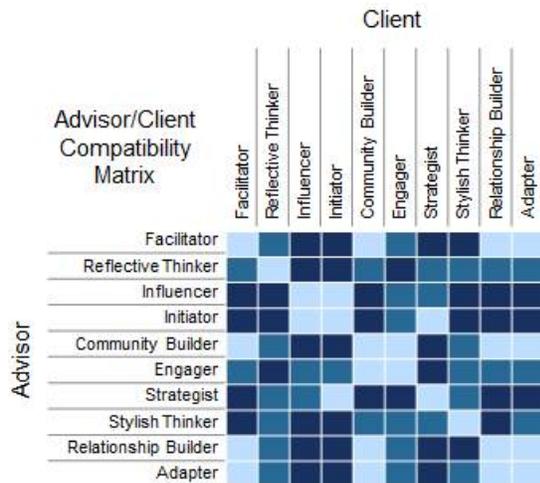


## Advisor/Client Compatibility

A strong long-term relationship with others can be built with commitment and mutual understanding. Successful relationships can be developed from any combination of behavioral style.

The graph below shows, for the Influencer style, those persons whom you will most easily work with in a team because you are generally closer in relationship style, and hence minimal behavioral modification required. Also, it shows those DNA Natural Behavior styles with whom you will have to more closely review how you each adapt because there are greater differences, and hence more behavioral modification required.

Adapting your behavior to relate to another person requires concentrating more on your level of self-awareness when you are with that person. However, when a person is different from you there are also many benefits because of their different perspectives. While recognizing that natural behavior is important, also sharing common values, beliefs and attitudes is important for building a successful relationship.



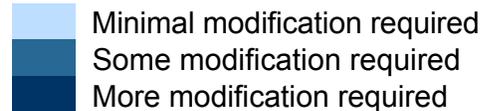
### Influencer

#### Typically Works Easily With:

Influencer, Initiator

#### Review How You Adapt:

Facilitator, Reflective Thinker, Community Builder, Stylish Thinker, Relationship Builder, Adapter



### Key Financial Planning Questions for you to Consider

1. Influencers have a strong desire to be seen as successful. What is motivating the goals you set? Are you being driven by image? How do you relate your financial and business goals to the quality of your family life? Why is money important to you?
2. As an investor are you devoting sufficient time into choosing the best advisors? Getting this right for you and your behavioral style will ensure that you make effective and successful decisions in terms of your finances. What might be the limitations in your own decision making style? Describe the behavioral style of an advisor, coach or mentor you think would be most beneficial to you.
3. How would you handle associates or family members whose decision making style in terms of financial planning and investment opportunities was uncertain and slow? Is your enthusiasm intimidating to quieter and more reflective behavioral styles? Would their procrastination affect you? What steps do you think you would need to take to help them get to a place of confidence in their decision making?

### Disclaimer

The purpose of this instrument is educational. It is designed to help people identify their natural behavioral strengths and struggles for making life, financial and investment decisions. The Financial DNA Natural Behavior Report should not be used to identify, diagnose, or treat psychological, mental health, and/or medical problems. Additionally, if this report is 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 this aid to self discovery. By using the Financial DNA Natural Behavior Report you expressly waive and relinquish any and all claims of any nature against DNA Behavior International, any affiliated companies, and/or their employees arising out of or in connection with the use of this survey. DNA Behavior does not purport to provide you with any securities or investment recommendations or advice. Before making any life, financial or investment decision, we recommend that you seek the wise counsel of a wealth mentor or advisor.

### Additional Reports

- If you would like to learn more about your life and financial decision making behavior and to get further guidance, please review your Wealth Mentoring Report.
- For more information, please email us at [inquiries@dnabehavior.com](mailto:inquiries@dnabehavior.com).