



DNA Behavior International *Measurable Human Behavior Solutions to Transform Personal and Business Performance*

**“Know Your Self, Team and Clients” to
Increase Emotional Engagement in Your Services**



*Guiding individuals, families and businesses with behavioral insights
to more confidently make the right choices for building a Quality Life.*



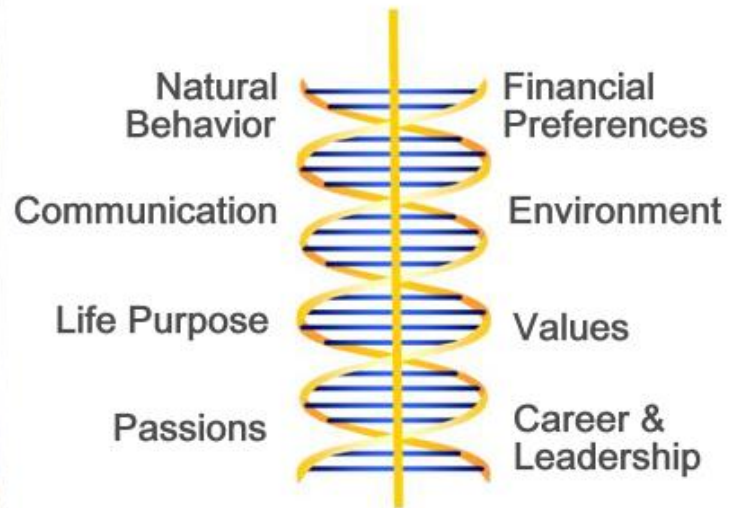
What is your plan for sustainable performance?

Research and experience shows that the greatest source of performance for individuals and businesses will primarily come from understanding, developing and confidently using their strengths, openly communicating and making the right choices based on a purpose based plan.

This all starts with discovering their DNA Behavior.



DNA Profiles Uncover:



DNA Solutions for Transforming Business and Personal Performance

Worldwide leaders in the provision of human behavior solutions for transforming every aspect of business and personal performance.

We offer a wide range of unique behavioral discovery, advisory, training and coaching programs to businesses and individuals in over 12 countries. Each program uniquely blends human behavior with personal discovery and business solutions.

All of these programs draw on very powerful and predictive human behavioral insights obtained from proprietary DNA Behavior profiling systems.

Leverage predictable behavioral insights into sustainable action plans for providing:

- Relationship and Communication Performance
- Team and Leadership Performance
- Client-Centered Business Performance
- Quality Life Performance
- Couple Quality Life Performance
- Family Life Performance
- Entrepreneurial Performance
- Career Performance
- Planned Giving Performance

DNA Behavior International
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Summary of DNA Profiles and Products

Human Behavioral Solutions for Transforming Personal and Business Performance



	Profile or Tool	Time to Complete	Outcome	Application	✓
DNA Marketing®	Communication DNA Profile	2-5 Mins	Communication preferences	Improve engagement of clients and employees	
DNA Behavior®	Natural Behavior Profile	10-15 Mins	Natural Behavior		
	▪ Life Planning Report		Life planning insights	Setting life direction	
	▪ Coaching Report		Life planning strengths and struggles	Talent development	
Financial DNA®	Core Life Motivations Profile	10-15 Mins	Natural Financial Behavior		
	▪ Financial Planning Report		Financial planning insights	Customization of financial planning process	
	▪ Risk Management Report		Risks to financial planning	Improve financial management	
	▪ Wealth Mentoring Report		Financial strengths and struggles	Enhance relationship to money	
	Financial Directions Profile	15-20 Mins	Learned Financial Behaviors	Financial plan creation	
	▪ Behavioral Portfolio Report		Portfolio parameters	Inside-out portfolio creation	
	▪ Financial Behavior Analysis		Personal financial alignment	Financial decision-making development	
	Quality Life Insights Profile	60-90 Mins	Environmental influence, passion, vision, life foundations, experiences, needs and wants	Life purpose discovery	
	Quality Life Financial Plan Workbook		Process for building a quality life plan	Setting committed goals; Decision-making matrix	
Business DNA®	Natural Talents Profile	10-15 Mins	Natural Workplace Behavior		
	▪ Workplace Operations Report		Identify workplace talents	Role and team alignment	
	▪ Risk Management Report		Risks to business performance	Improve workplace management	
	▪ Coaching Report		Business strengths and struggles	Business performance enhancement	
	Leadership Engagement 360 Profile	10-15 Mins	Perceptions of leadership communication, results, relationships, EQ, trust, values, competence	Leadership development	
	Sales Engagement 360 Profile	10-15 Mins	Perceptions of sales communication, results, relationships, EQ, trust, values, competence	Sales team development	
	Advisor Engagement 360 Profile	10-15 Mins	Perceptions of advisor communication, results, relationships, EQ, trust, values, competence	Advisor development	
	Business Engagement 360 Profile	10-15 Mins	Perceptions of corporate communication, results, customer engagement, supplier engagement, leadership, values, operational competence	Business engagement review	
Family DNA®	Core Family Life Motivations Profile	10-15 Mins	Natural Family Behavior		
	▪ Financial Planning Report		Family decision-making insights	Customization of family discussions	
	▪ Risk Management Report		Risks to family dynamics	Improve family financial management	
	▪ Wealth Mentoring Report		Family strengths and struggles	Enhance family interaction	
	Futurity Profile	60 Mins	Family member attitudes to wealth creation, wealth transfer, family business, philanthropy	Family map creation for decision-making	
	Family Engagement 360 Profile	10-15 Mins	Perceptions of family communication, results family member engagement, trust, family leadership, values, financial competence	Family engagement review	
	Family Quality Life Review	2-5 Mins	Family life pulse check	Hi spot family review	

	Profile or Tool	Time to Complete	Outcome	Application	✓
Philanthropy DNA®	Core Planned Giving Profile	10-15 Mins	Natural Planned Giving Behavior		
	▪ Financial Planning Report		Financial planning insights	Customization of planned giving process	
	▪ Wealth Mentoring Report		Planned giving strengths and struggles	Build planned giving plan and legacy	
Entrepreneurship DNA®	Natural Talents Profile	10-15 Mins	Natural Entrepreneurship Behavior		
	▪ Business Growth Report		Identify entrepreneurial talents	Improve business productivity	
	▪ Success Coaching Report		Entrepreneurial strengths and struggles	Entrepreneurial performance enhancement	
Career Life DNA®	Career Life DNA Profile	15-20 Mins	Learned behaviors, skills, knowledge, competence, influencing career choices	Establish career direction	
	Career Life Insights Profile	60-90 Mins	Environmental influence, passion, vision, life foundations, experiences, needs and wants	Career purpose discovery	
	Career Life Plan Workbook		Process for building a career plan	Setting career and life goals; Decision-making matrix	

Summary of DNA Facilitation Services

Human Behavioral Solutions for Transforming Personal and Business Performance



	Program	Length	Outcome	Participants	✓
Business DNA®	DNA Personal Insights Review	1 Meeting	Review of your Natural Talents Profile to improve self awareness of how your strengths and struggles impact your self-awareness	Leaders and Employees	
	DNA Business Engagement 360 Review	3 Meetings	Provide in-depth feedback to assist in identifying the business engagement strengths and struggles of the company for identifying areas to improve performance	Leaders	
	DNA Sales Engagement 360 Review	2 Meetings	Provide feedback to assist in the development of your sales performance and the building of enhanced customer relationships	Sales people	
	DNA Leadership Engagement 360 Review	2 Meetings	Provide feedback to assist in the development of your leadership performance and the building of workplace relationships	Leaders	
	DNA Advisor Engagement 360 Review	2 Meetings	Provide feedback to assist in the development of your advisory performance and the building of enhanced client relationships	Advisors	
	DNA Hiring Top Talent	1 Meeting	Hiring Candidate Review	Leaders and employees	
	DNA Business Performance Coaching	2 Meetings/ Mth	Ongoing 1:1 coaching to improve personal and business performance	Leaders and Advisors	
Financial DNA®	DNA Personal Insights Review	1 Meeting	Completion of all Financial DNA Profiles to improve self awareness of how you make life, financial and investment choices based on your strengths and struggles	Advisors	
	DNA Financial Discovery Review	1 Meeting	Identifying your successes based on strengths and financial blind-spots	Investors	
	DNA Financial Planning Review	3 Meetings	Learn how your financial personality style connects with your financial plan and investment plan	Investors	
	DNA Financial Growth Review	4 Meetings	Discover your financial personality and life purpose to set committed goals for building a Quality Life Performance Plan	Investors	
	DNA Financial Journey Review	8 Meetings	Discover your financial personality and life purpose for building a Quality Life Performance Plan along with designing the transformation steps.	Investors	

Summary of DNA Training and Seminars

Human Behavioral Solutions for Transforming Personal and Business Performance



	Program	Length	Outcome	Audience	✓
DNA Marketing®	Know Your Clients	1hr	Improving performance by knowing the motivations of your clients	Advisors, Clients, Employees	
	Building Open Communication	1 to 3hrs	Improve engagement of clients and employees	Advisors, Employees	
DNA Behavior®	Human Performance in the New Behavioral Economy	1 Hour	Inspirational presentation on the formula for improving performance based on increasing confidence and emotional engagement of others	Advisors, Clients, Employees	
	The New Normal	1 Hour	How to build and participate in the Behavioral Economy	Advisors, Clients, Employees	
Financial DNA®	DNA Quality Life Performance	1 or 3 Hours	Learning how to make the right choices for a Quality Life	Investors, Advisors	
	Inside Out Financial Planning	1 or 3 Hours	Connecting behavioral discovery to the financial planning process	Advisors	
	Behavioral Portfolio Allocation	1 or 3 Hours	Influences of financial behaviors on building a portfolio	Advisors	
	Smart Behavior, Smart Decisions	1 or 3 Hours	Learning how to make the right choices for building a Quality Life	Investors	
	Introductory Online Training	2 Hours	Getting started with using the Financial DNA Profiles	Advisors	
	Quality Life Performance Workshops	1 or 2 Days	Discovering your life purpose for living a quality life – talents, passions, vision, values and needs and wants	Investors, Executives	
	Wealth Mentor 1 Training	2 Days	Discovering Client Behavior – Interpreting and facilitating the Financial DNA Profiles	Advisors	
	Wealth Mentor 2 Training	2 Days	Building a Quality Life Performance Plan – facilitating discovery of passions, gifts, values and life purpose	Advisors	
Business DNA®	Sales Team Engagement	1 or 2 Days	Awareness and management of behaviors impacting sales and client service performance	Sales Teams	
	Team Development Online Workshop	2 Hours	Awareness of different behaviors in the team and how to use each person's strengths	Leaders, Employees	
	Building a Healthy Team	1 or 2 Days	Facilitation of how to build a healthy team. Focus on leveraging team strengths and overcoming dysfunctions	Leaders, Employees	
	Leadership Engagement	1 or 2 Days	Learn how to lead from the front and emotionally engage your team for high business performance	Leaders, Employees	
	Business DNA Advisor 1 Training	2 Days	Discovering Business Behavior – Interpreting and facilitating the Business DNA Profiles for client engagement, coaching and team building	Consultants, HR	
	Business DNA Advisor 2 Training	2 Days	Business Advisory Programs – using the Business DNA Profiles for enhanced business and personal performance – leadership, business planning, succession	Consultants	
	DNA Performance	24 Hours over 1 Year	Structured Program focusing on performance in 6 core areas for building a business: personal strengths, relationships, team, clients, marketing and business planning	Advisors, Professionals, Sales teams, Leaders	
Family DNA®	Navigating Family Dynamics	1 Hour or 3 Hours	Understanding family differences and relationships	Families, Advisors	
	DNA Family Meetings	2 Days	Program to build family communication, manage wealth transfer, succession planning, define legacy	Families	
	Wealth Mentor 3 Training	2 Days	Using the Family DNA Profiles to conduct family meetings, wealth transfer family succession planning and defining legacy	Advisors	

	Program	Length	Outcome	Audience	✓
Philanthropy DNA®	Discovering Planned Giving Motivations Workshop	<i>1 or 3 Hours</i>	Understand how different people make planned giving decisions and wish to be communicated with in the planned giving process	Investors, Advisors	
Entrepreneurship DNA®	Entrepreneur Success Performance	<i>2 Days</i>	Discover your unique gift to improve personal and business performance	Business owners	
Youth Life DNA®	Quality Life Youth Foundations Program	<i>1 or 2 Days</i>	Discovery of your life purpose for living a quality life, making career decisions, building healthy relationships, setting life goals and making financial decisions	Youth between 17 to 25 years	

Summary of DNA Advisory Services

Human Behavioral Solutions for Transforming Personal and Business Performance



	DNA Performance Solutions	Outcome	Audience	✓
DNA Marketing®	Communication Strategies Client Segmentation Tailoring Information Flows Matching Advisors and Clients Customizing Solutions to DNA	Transform marketing performance with clients and prospects	Businesses, Advisors	
DNA Behavior®	Client Centered Business Transformation Strategies	Transform business performance through focusing on the client experience	Businesses and Organizations	
	Design of Personal Performance Programs	Transform personal performance through developing personal strengths, open communication and making the right choices based on a purpose based plan	Individuals, Families, Sporting Teams and Ministries	
Financial DNA®	Quality Life Performance Services	Transform quality life performance from more confidently making the right choices based on a life purpose	Individuals, Couples and Families	
	Advisor Transformation	Transform advisor personal performance based on discovery of personal strengths, open communication and a sustainable plan	Advisors	
	Ideal Advisory Practice for Advisors Advisory Business Model Reviews Advisory Firm Performance Financial Planning Service Delivery Processes Fee Charging Structure	Transform advisory practice performance based on a client centered approach	Advisors, Broker Dealers	
Business DNA®	Business Engagement and Stakeholder Reviews Hiring and Talent Alignment Behavioral Interviewing Behavioral Benchmarks Team Performance Leadership Performance Board Performance Succession Planning Sales and Client Service Reviews Client Service Delivery Processes Client Relationship Systems Service Centered People Culture Management Business Planning Reviews Business Productivity Reviews Business Model Redevelopment Business Process and Systems Refinement	Transform business performance based on a client centered approach	CEO's, Boards, Leaders, Sales Managers, Human Resources	
Family DNA®	Family Communication Family Succession Planning Family Wealth Transfer Family Governance Family Legacy Family Planned Giving Strategies	Transform family life performance based on discovery of personal strengths, open communication and a cohesive family plan	Families, Advisors	
Philanthropy DNA®	Fund Raising Strategies for Organizations	Transform fund raising performance for not for profit and ministry organizations based on a donor centered approach	Not for Profit and Ministry Organizations	
	Giving Plan Design Gifting Due Diligence	Transform personal planned giving performance	Donors, Families, Advisors	

	DNA Performance Solutions	Outcome	Audience	✓
Entrepreneurship DNA®	Entrepreneurial Success Factor Reviews Business Reorganization Business Model Development Succession Planning	Transform entrepreneurial business and personal performance to live a quality life	Business owners	
Youth Life DNA®	Career Planning Advice and Coaching	Transform career performance	Youth between 17 to 25 years	
	Career Planning Program Design	Improve career program performance	Schools, Universities	

Summary of DNA Knowledge Products

Human Behavioral Solutions for Transforming Personal and Business Performance



	Knowledge Product	Description	✓
Financial DNA®	Financial DNA Book	Hugh Massie unveils a proven process for better financial decision-making that is based on discovering an individual's unique financial personality.	
	Unlocking Potential Guide for Financial Advisors	Providing Advisors and Executives with a quick snapshot on how to interpret and then apply each of the 10 Core Life Profiles.	
	Powerful Questions for Advisors	Facilitating the client through a discussion on their Financial DNA Profiles and planning needs	
	The "Financial DNA Client Discovery" Seminar - on CD	2 hour introductory training program to practically experience the Financial DNA Discovery Process so it can be incorporated in an Advisor's practice.	
	Financial DNA® - Client Engagement in a Box	An end-to-end documented process for engaging clients in Financial DNA along with an Advisor's financial services.	
Business DNA®	Unlocking Potential Guide for Leaders	Providing Leaders and Executives, with a quick snapshot on how to interpret and then apply each of the 10 Core Life Profiles.	
	Powerful Leadership Questions	Providing a framework to design a meeting agenda for facilitating team members through a discussion on their talents and career needs.	
	Powerful Hiring Questions	Providing a step-by-step methodology and Powerful Questions for hiring.	
	Getting Hired Tips	Providing questions to ask a prospective employer and what questions will be asked.	
Family DNA®	Powerful Questions for Family Meetings	Powerful tools and resources for facilitating a family meeting. Covering the setting, preparation and dialogue. The unique insights offered in this book will provide families with enhanced communication.	