Jake Northrup: Facilitator
Facilitators are good at guiding people with feelings yet with the determination to reach goals and accomplish tasks.

Kaleigh Northrup: Community Builder
Community Builders excel at meeting people and promoting cooperation among groups of people.

**Risk behavior**
Higher scores are associated with higher risk takers.

- Risk taker and tolerant of losses
  - Jake: 62
  - Kaleigh: 14
  - Jake: Safely manages risks and able to see pitfalls
  - Kaleigh: Delegates to advisors and relationship driven

**Financial relationship management**
Higher scores indicate the more time and energy you wish to spend working with your financial adviser.

- Prefers to maintain control of decisions and results driven
  - Jake: 42
  - Kaleigh: 88
  - Jake: Delegates to advisors and relationship driven
  - Kaleigh: Desires to spend and appreciates spending freedoms

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

- Saver and follows budgets
  - Jake: 69
  - Kaleigh: 16
  - Jake: Desire to spend and appreciates spending freedoms
  - Kaleigh: Prefers flexible goals and is often ambitious

**Wealth building motivation**
Higher scores are associated with high goal-setting and ambitious investors who set and ambitiously pursue goals.

- Pursues goals and is often ambitious
  - Jake: 99
  - Kaleigh: 31
  - Jake: Prefers flexible goals and is often ambitious
  - Kaleigh: Has emotional impulses and makes spur of the moment decisions

**Financial emotional intelligence**
Higher scores represent emotionally intelligent investors who will be able to more effectively recognize and balance their impulses.

- Likely to recognize and balance emotional impulses with logic
  - Jake: 69
  - Kaleigh: 10
  - Jake: Has emotional impulses and makes spur of the moment decisions
  - Kaleigh: Has emotional impulses and makes spur of the moment decisions
The Importance of Understanding Your Financial Behavior

For advisors to provide valuable advice, it is key that they understand you and your goals. Measuring and discussing your financial behavior is a first step for your advisor to get to know you. Your financial behavior describes how you make decisions around money, your communication style, how you react to market events, and what motivates you to achieve your goals. These elements help drive a financial plan that is appropriate and custom for you.

Other factors may influence the investment strategy that is ideal for you such as;

- Amount of time you planned to achieve your goals
- Risk and return required to achieve your financial goals.
- Experiences such as education, upbringing, and life lessons that may have changed your approach to finances throughout your lifetime.

Share Your Financial DNA With Others

Share your results with family members and other mentors. The below guide illustrates how the 10 unique styles are similar or different to others.

Risk behavior
Risk taker and tolerant of losses
Higher scores are associated with higher risk takers.

Financial relationship management
Prefers to maintain control of decisions and results driven
Higher scores indicate the more time and energy you wish to spend working with your financial adviser.

Financial planning management
Saver and follows budgets
Higher scores are associated with financially organized investors, and indicate tendencies to save money and follow budgets.

Wealth building motivation
Pursues goals and is often ambitious
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Your Financial Behavior Report

Kaleigh Northrup: Community Builder

Provided by your advisor: Jake Northrup

Community Builders excel at meeting people and promoting cooperation among groups of people.

Your Behavioral Biases

These biases may get in the way of wise decision making. Your advisor will discuss strategies to help you manage your instincts in your financial plan.

Loss Aversion - May not realize losses to avoid pain even though values may fall further.

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

Risk behavior
Safely manages risks and able to see pitfalls
Higher scores are associated with higher risk takers.

Financial relationship management
Delegates to advisors and relationship driven
Higher scores indicate the more time and energy you wish to spend working with your financial adviser.

Financial planning management
Desire to spend and appreciates spending freedoms
Higher scores are associated with financially organized investors, and indicate tendencies to save money and follow budgets.

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