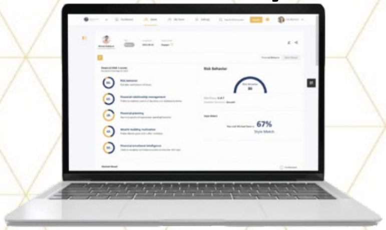
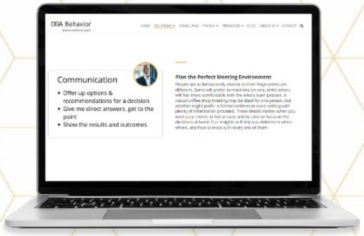
FINANCIAL DNA®

Personalize the Financial Planning Process

Natural Behavior Discovery

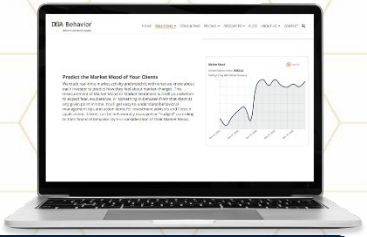


Communication, Financial Behavior



Advisor Client Match

Market Mood

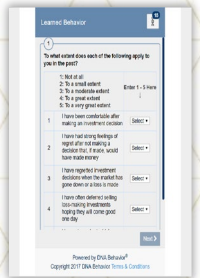


ONBOARDING: KYC, DISCOVERY, PLANNING AND MONITORING

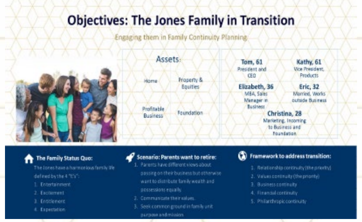
ENHANCED WEALTH MENTORING OPPORTUNITIES

Money Energy Discovery

Quality Life Goals Discovery



FDNA Learned Behavior Discovery



Managing Family Continuity

The FDNA Discovery Process that Wealth Mentors Follow Structured Series of Six 1hr Meetings Post Engagement

Wealth Mentors Facilitating Financial DNA®

Initial Pre-Client Engagement Meeting

Enhance Your Communication and Set Direction

Discuss the Quality Life Pulse Check

Review the Client's Communication Style and share your own to tailor communication.

Discuss the Quality Life Review

First + Second Meeting Post-Client Engagement

Discover Your Unique Financial Personality Code

Review the FDNA Natural Behavior Discovery - Financial Behavior insights to gain insights into how behavioral and life issues are integrated to the financial plan and investment portfolio, including risk taking.

Third Optional Meeting Post–Client Engagement

Discover Your Money Energy

Review the FDNA Quality Life Performance and ME Opportunities Discoveries to identify their relationship to money integration based on identity and purpose.

Fourth Meeting Post-Client Engagement

Discover Your Identity Bssed on Life Purpose

Review the DNA Quality Life Planning Discovery to identify their talents,-passions, x-factor, vision, values and life purpose.

Fifth Meeting Post-Client Engagement

Set Quality Life Goals

Review Quality Life Goals Discovery to identify the timeframe for needs and wants

Sixth Meeting and Annual Meetings

Financial Behavior Modification

Review the FDNA Learned Behavior Discovery to identify areas where financial behavior can be adapted**.**

Re-do Money Energy Discovery to identify level of financial-life integration, and areas to adapt.

Making Framework for making the right choices to Live a