

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	

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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	