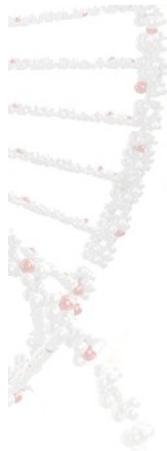


## Lab 1

Terry Smith is 35 years old and his wife, Mindy, is 33. They recently celebrated their 10-year wedding anniversary. They have three children, ages 3, 5, and 8. Terry is a CPA; Mindy has never worked outside of the home, although she completed one year of college.

Terry and Mindy have been attending a large church since they were married. Terry sings in the choir; Mindy is active in children's Sunday school. On the surface it appears that this is a happy, well-adjusted family. They have a comfortable house, new cars, and enjoy good health.

### PID results of Terry



#### 1. IDEAL ENVIRONMENT:

Drivers realize their highest potential with opportunities to:  
Build - Direct - Develop - Create -  
Lead - Conceptualize - Decide -  
Be in control - Initiate solutions.

#### 2. TYPICAL AREAS OF STRENGTH:

Drivers are bold, direct, confident, competitive, often pioneering, assertive, frank, independent, and responsive to new challenges. They excel by having the freedom to define a direction focused on results.

#### 3. TYPICAL AREAS OF STRUGGLE:

People with the Driver profile may tend to be impatient, insensitive to the feelings of others, frustrated with details and routines, a poor listener, impulsive, too blunt, or overbearing.

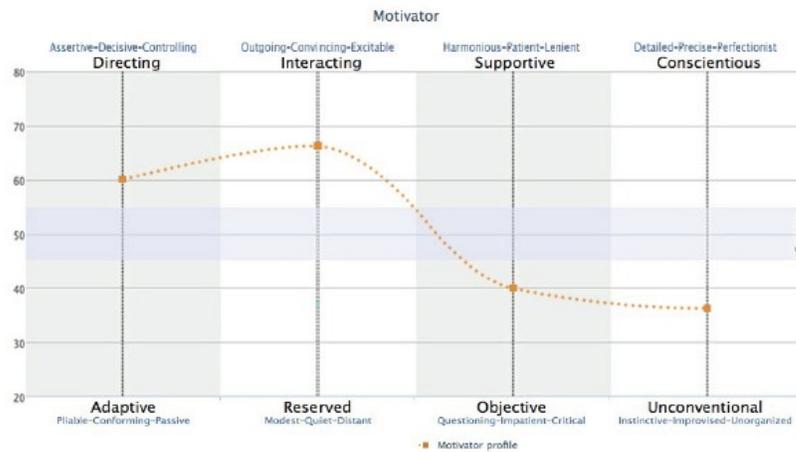
#### 4. PREFERRED ACTIVITIES:

To maximize a Driver's talents, assign them to situations in which they can have a high level of independence, with obstacles to overcome, challenges to meet and solve, without many details to handle.

#### 5. COMMUNICATION STYLE:

This person communicates directly and forcefully, getting to the bottom line quickly. As a result, others may see this person as demanding, impersonal, and dominating.

# PID results of Mandy



## 1. IDEAL ENVIRONMENT:

Motivators realize their highest potential with opportunities to:  
 Network - Persuade Create - Relate  
 - Initiate solutions -Communicate -  
 Be in control - Entertain - Gain  
 recognition - Be active.

## 2. TYPICAL AREAS OF STRENGTH:

Motivators are passionate, highly interactive people who love to achieve, influence, and relate with others, especially large groups. They thrive on variety, changes, new challenges, and opportunities to convince others of their viewpoints. They point to the future with great optimism.

## 3. TYPICAL AREAS OF STRUGGLE:

This person may sometimes may push his or her strengths to the extremes;and may exhibit weaknesses, such as exaggeration, hyperbole, becoming too emotional, or overlooking key details. At that point the approach may become controlling, impatient, or impulsive.

## 4. PREFERRED ACTIVITIES:

Because people with this style demonstrate a desire to achieve and be recognized, they function best when they have frequent people interaction and have opportunities

## 5. COMMUNICATION STYLE:

This person and others in this profile communicate through their superior verbal abilities, combining their zeal and passion to motivate others to action. They sometimes need to wait for others to catch-up to their ambitious goals.

## MoneyLife Indicator (Pre-Assessment)

Review the importance of the MLI assessment in measuring the 9-factors of *Beliefs and Behaviors*. Discuss the following: (1) overall score, (2) *Top 3-Scores* in both *Beliefs and Behaviors*, and (3) the *Top 3-Areas of Improvement* scores in both *Beliefs and Behaviors*.

Pre -MoneyLife Indicator Scores Husband				Pre -MoneyLife Indicator Scores Wife			
Overall Score	77		Terry	Overall Score	71		Mindy
Top 3 Areas to Improve				Top 3 Areas to Improve			
Beliefs		Behaviors		Beliefs		Behaviors	
1	Legacy	1	Debt	1	Debt	1	Debt
2	Planning	2	Legacy	2	True Riches	2	Giving
3	Managing	3	Investing	3	Planning	3	managing
Scores by Section				Scores by Section			
Sections		Beliefs	Behavior	Sections		Beliefs	Behavior
Understanding True Riches		95	80	Understanding True Riches		65	65
Giving		90	75	Giving		80	50
Working		95	90	Working		90	90
Saving		90	75	Saving		75	70
Investing		90	60	Investing		90	70
Planning		80	75	Planning		70	65
Debt		75	50	Debt		50	45
Legacy		60	55	Legacy		80	75
Managing		80	70	Managing		80	60