

# Financial DNA

## University Student Program



# Program overview and support options

Financial DNA is committed to helping the next generation of financial advisors become Behaviorally SMART.

The following self-help steps have been created to assist University faculty in delivering the Financial DNA program to students.

If at any point the University faculty members have a question regarding the process, please review our Self-help support center or create a web support request as phone support is not provided.

[Self-help support center](#)

[Web support request](#)

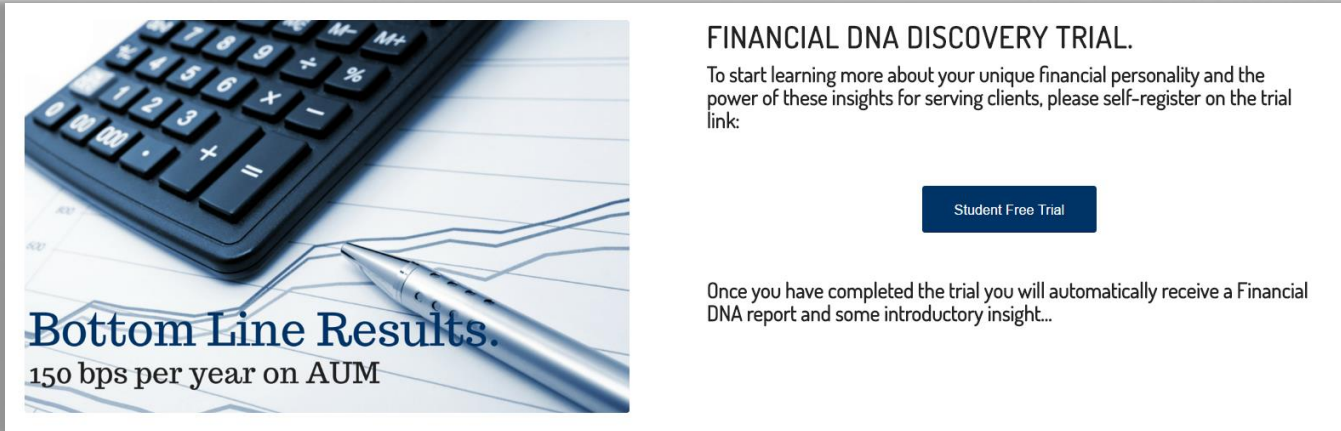
# STEPS FOR STUDENTS TO COMPLETE FREE STUDENT TRIAL

# Step 1: University Faculty distributes student link

- The University Faculty distributes the following link to the students  
<http://financialdna.com/students/>

## Step 2: Students receive the website link from the University Explore materials and register to complete process

1. Students arrive on the [student link](#) and explore resources.
2. Students complete Free Student Trial:
  - To do so, students identify and select the “Student Free Trial” button shown below.



The banner is split into two main sections. On the left, there is a photograph of a black calculator and a silver pen resting on a document with a line graph. The text 'Bottom Line Results.' is written in a large, blue, serif font, with '150 bps per year on AUM' in a smaller, black, sans-serif font below it. On the right, the text 'FINANCIAL DNA DISCOVERY TRIAL.' is in a bold, black, sans-serif font. Below this, a paragraph in a smaller black font reads: 'To start learning more about your unique financial personality and the power of these insights for serving clients, please self-register on the trial link:'. A dark blue button with the white text 'Student Free Trial' is centered below the paragraph. At the bottom of the right section, another paragraph in a smaller black font reads: 'Once you have completed the trial you will automatically receive a Financial DNA report and some introductory insight..'

**Bottom Line Results.**  
150 bps per year on AUM

**FINANCIAL DNA DISCOVERY TRIAL.**

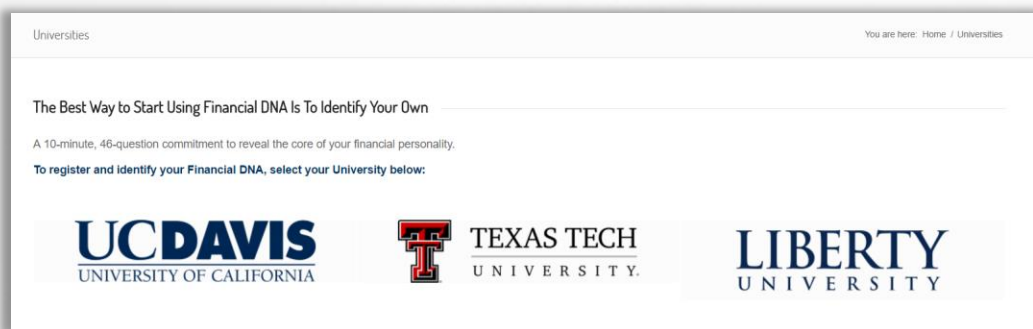
To start learning more about your unique financial personality and the power of these insights for serving clients, please self-register on the trial link:

[Student Free Trial](#)

Once you have completed the trial you will automatically receive a Financial DNA report and some introductory insight..

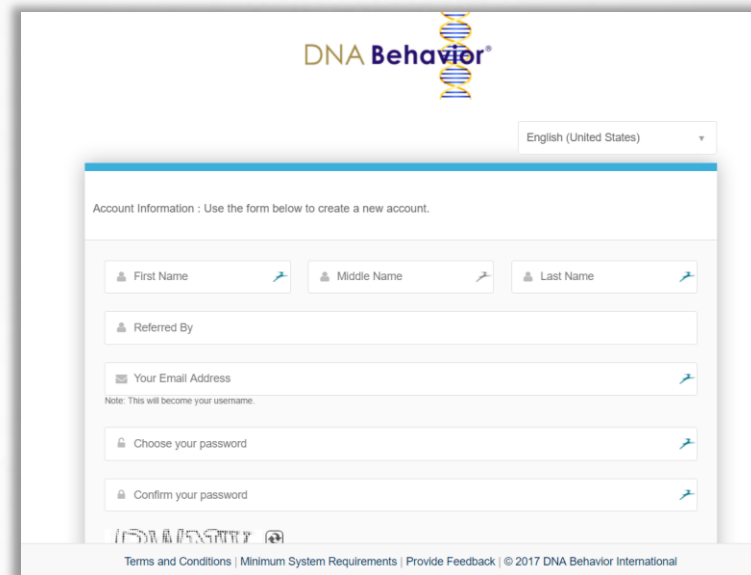
# Step 3: Students select their school

- After selecting the “Student Free Trial” button, the students then select their University from the list available.
  - After selecting the appropriate school, a new URL appears where the students can register to complete their Financial DNA process.



The screenshot shows a web page titled "Universities" with a breadcrumb trail "You are here: Home / Universities". The main heading is "The Best Way to Start Using Financial DNA Is To Identify Your Own". Below this, it states "A 10-minute, 46-question commitment to reveal the core of your financial personality." and "To register and identify your Financial DNA, select your University below:". Three university logos are displayed: UC Davis (University of California), Texas Tech University, and Liberty University.

Select your school



The screenshot shows the "Account Information" registration form on the Financial DNA website. The page features the "DNA Behavior" logo and a language dropdown menu set to "English (United States)". The form instructions state: "Account Information : Use the form below to create a new account." The form fields include: "First Name", "Middle Name", and "Last Name" (each with a blue arrow icon); "Referred By"; "Your Email Address" (with a blue arrow icon and a note: "Note: This will become your username."); "Choose your password" (with a blue arrow icon); and "Confirm your password" (with a blue arrow icon). At the bottom, there are links for "Terms and Conditions", "Minimum System Requirements", and "Provide Feedback", along with the copyright notice "© 2017 DNA Behavior International".

Register for process

# Step 4: Review Results

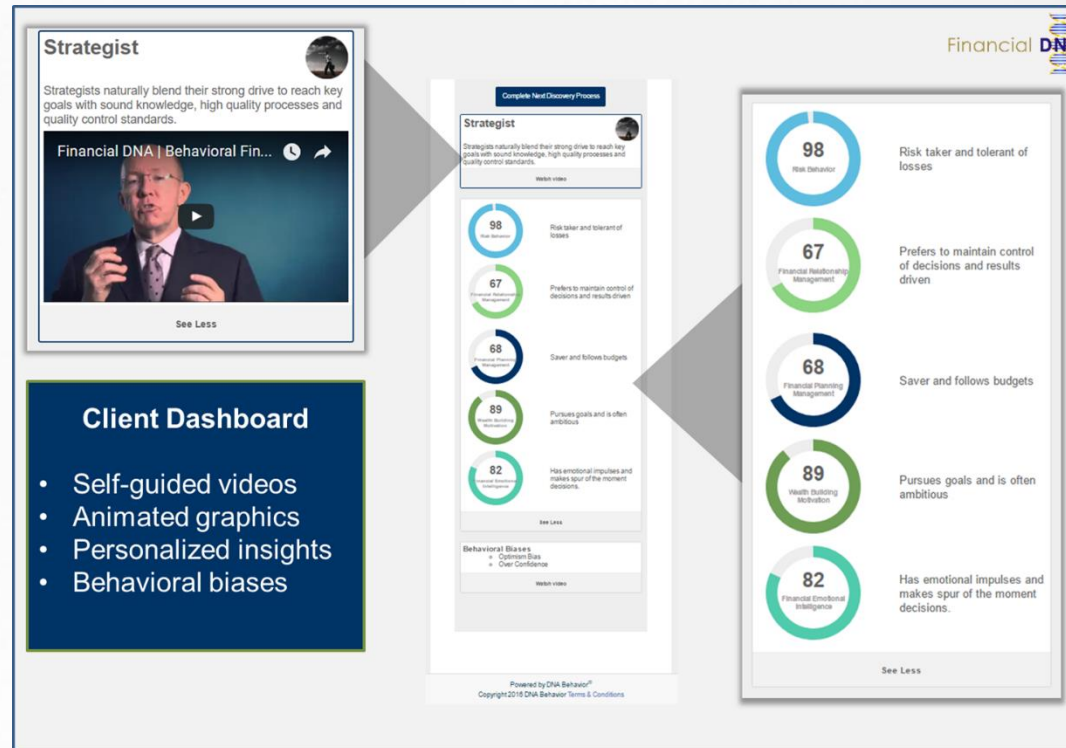
## The Students' Financial DNA Results

After completing the 10-minute, 46-question discovery the students will automatically receive their results on a Financial DNA dashboard.

What's included:

- 1 Unique Style Video
- 2 Behavioral Bias Videos
- 5 scores highlighting the student's Financial Personality.
- A Financial DNA Summary Report PDF

**NOTE: We strongly recommend that the students save this PDF report on their computer for further classroom discussions.**



# REVIEWING THE RESULTS WITH THE STUDENTS



## Recommended resources for connecting the concepts of Behavioral Finance with the students' results

- [Behaviorally Smart Financial Planning Book](#)
  - Students read the book independently then review client case studies as a class.
- [Financial DNA FAQ](#)
  - Answers to our Frequently Asked Questions from current Financial Advisors.
- [Additional Financial DNA Student Resources](#)
  - Additional resources are available at the main student page.

# Contact Us

For more information about  
Financial DNA and to complete a trial:

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