



Financial Planner - Core+ Assessment Report

Candidate:
John SamplePerson

Date:
05/20/2026

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 Date: May 20, 2026

Username: RESOWRPJ0001
 Candidate: John SamplePerson

The following information is a feedback report based on the results of validated psychological assessment dimensions. Depending on the sections included in the test battery, there may be multiple pages of explanatory information. Please review thoroughly for the best overall interpretation of your candidate's scores.

PERSONALITY TRAITS

The profile below summarizes key results in each area compared against general population norms (indicated by the descriptors Low, Below Average, Average, Above Average, and High) and with norms for high performers in the type of job for which the candidate is applying (designated by the shaded areas). The candidate's score is indicated by the diamond symbol: ◆

	Low	Below Average	Average	Above Average	High
AGREEABLENESS			◆		
ASSERTIVENESS					◆
CONSCIENTIOUSNESS				◆	
CUSTOMER SERVICE / RESPONSIVENESS			◆		
EMOTIONAL STABILITY / RESILIENCE				◆	
EMPATHY				◆	
EXTROVERSION					◆
INTEGRITY				◆	
INTRINSIC MOTIVATION	◆				
OPENNESS			◆		
OPTIMISM/ENTHUSIASM				◆	
ORDERLINESS			◆		
TEAMWORK			◆		
TOUGH MINDEDNESS			◆		
WORK DRIVE					◆

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GENERAL COGNITIVE APTITUDE ASSESSMENT

OVERALL GENERAL COGNITIVE SCORE



Compared to general adult norms using standardized tests validated for a wide range of jobs, we estimate overall level of mental ability to be in the **50-59%ile** range. His individual aptitude levels are:

Abstract Reasoning	50-59%ile
Numeric Reasoning	40-49%ile
Verbal Reasoning	50-59%ile

John falls in the average range with regard to general cognitive ability. He can solve most routine problems and should perform most mental tasks adequately. He will be a satisfactory, but not remarkable, cognitive performer in this job.

Score Breakdown by Question Type (44 total questions)

ABSTRACT REASONING—Demonstrates ability to make sense of conceptual information, reason abstractly and determine patterns and relationships among symbolic stimuli:

Candidate scored **6 correct out of 14** possible questions or 43% correct.

NUMERIC REASONING—Demonstrates ability to logically analyze numerical information, reason with numbers and make inferences about quantitative relationships:

Candidate scored **8 correct out of 13** possible questions or 62% correct.

VERBAL REASONING—Demonstrates ability to to comprehend English vocabulary, reason with verbally-based information, and draw conclusions based on complex verbal stimuli:

Candidate scored **8 correct out of 17** possible questions or 47% correct.

General Cognitive Aptitude Score Interpretation

These aptitude scores reflect percentile rankings -- not percent correct on the test. For example, if a person scores 80-89%ile on a specific test in this report, it means that they scored at least as well or better than 80-89%ile of the norm group, but not as high as about 10-20%ile of the norm group.

The **Overall General Cognitive Aptitude Score** is an average of the standardized scores for the three separate aptitude tests given to this candidate.

The lower the score, the more difficulty a candidate is likely to have learning new information and making decisions. If experienced in their profession, they may perform well practiced tasks effectively but struggle with new things. They may need extra training or more support from managers. Low scorers can become overwhelmed by complexity and generally prefer duties requiring specific answers rather than insightful solutions.

The higher the score, the more we predict that the candidate will learn quickly, pick up a lot of new information on their own without needing to be trained, handle a large information load easily, make decisions in an efficient manner, and show a great deal of insight about how to solve new and complex problems.

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NARRATIVE RESPONSES PROVIDED BY THIS CANDIDATE

In reading through the candidate's responses, you should look for general themes that reflect the person's attitudes, values, and beliefs about work. Insights can help you generate probing interview questions. From another perspective, the way in which candidate responses are constructed demonstrate sophistication of communication skills.

Annoyances	Mr. Sampleperson's Responses
<i>I don't like to work with people who...</i>	...
<i>I get annoyed at work when...</i>	...
<i>At times my work has suffered because...</i>	...
<i>I would really dislike a supervisor who...</i>	...
<i>People should recognize I am stressed out when...</i>	...
<i>It's hard to do good work when...</i>	...
<i>I would turn down a job if...</i>	...
Ideal Job	Mr. Sampleperson's Responses
<i>The most fulfilling job I had...</i>	...
<i>What I want most from a job is...</i>	...
<i>My career goal for five years from now...</i>	...
<i>The set of responsibilities I enjoy most are...</i>	...
<i>I enjoy working with people who...</i>	...
Leadership Style	Mr. Sampleperson's Responses
<i>When I have to make a decision quickly...</i>	...
<i>My success as a manager derives from...</i>	...
<i>Mentoring employees who report to me...</i>	...
<i>Besides supervising other people, a manager should...</i>	...
<i>The best way to motivate people...</i>	...
<i>The average employee...</i>	...
<i>An employee who brings personal problems to work...</i>	...
<i>I deal with conflict in my team by...</i>	...
<i>To increase employee commitment I...</i>	...
<i>To be a valuable member of a senior management team, I try to...</i>	...
<i>As a leader, my greatest satisfaction at work...</i>	...
<i>The biggest challenge to a manager in dealing with today's workforce...</i>	...
<i>When I have to reprimand or discipline an employee...</i>	...
<i>The organizational culture I try to create is best described as...</i>	...
Strategies for Success	Mr. Sampleperson's Responses
<i>The best way to get ahead in an organization...</i>	...

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<i>The personal strengths I possess that will help me be successful in this job include...</i>	...
<i>Working long hours every week...</i>	...
<i>To better myself I...</i>	...
<i>My attitude about work-home balance is...</i>	...
<i>The key to success in my career...</i>	...
<i>To get ahead in a company...</i>	...
<i>When I am criticized...</i>	...

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PERSONALITY TRAIT INTERPRETATION

Strengths:

- For the most part, he is agreeable and easygoing at work. John will usually avoid disagreements, conflict, and arguments with other people.
- He has a very forceful and assertive interpersonal style. He won't let other people take advantage of him and will stand up for what he believes in.
- Trustworthy and conscientious in his work habits, he will perform job tasks and duties in a reliable manner that others can count on.
- With good control over his emotions, he can handle most forms of job strain. When subjected to normal pressures on the job, he keeps his composure and does not let stress undermine his performance.
- He can usually identify with the feelings and concerns of other people. John's empathy enables him to understand and relate to the people he works with. He is likely to be perceived by customers as someone who is fairly considerate, insightful, and helpful.
- He is extroverted, gregarious, warmhearted, and expressive. He will be an effective communicator who is attuned to social cues and interpersonal dynamics in the workplace. He will make an effort to establish and maintain contacts with other areas in the organization.
- An above-average level of integrity suggests this candidate is unlikely to lie, deceive, cheat, or engage in questionable or improper job behavior.
- About average in terms of being open to change and innovation at work, he will consider new ideas and ways of doing things on his job, he needs to be convinced of their usefulness before making a change.
- He often expects favorable outcomes in the future, both for himself and other people. Being fairly optimistic, he tries to look for the best in others and on the bright side in most situations. He seldom feels discouraged when confronted with obstacles or setbacks on his job.
- Often, he approaches tasks methodically, paying attention to intermediate steps in task completion. However, John can also improvise when necessary and adjust his approach to accommodate changing demands and constraints.
- John is moderately teamwork oriented. He usually works cooperatively with other employees, but also works well in situations calling for individual contribution and self-reliance.
- This applicant's tough mindedness score is average so he will tend to look at both the objective factors and subjective considerations when making decisions. He places importance on not only personal feelings, but also empirical data and logical relations in determining a course of action.
- A high work drive suggests this candidate will put a lot of effort into meeting job demands. Long hours and an irregular schedule will not be a problem for him, even on a continuing basis.

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Developmental Concerns:

- In trying to handle situations that are particularly upsetting or aggravating, he can sometimes be disagreeable or harsh in how he comes across to others. John might benefit from feedback on maintaining consistently positive relationships with others on the job.
- Sometimes too aggressive or overbearing, he may occasionally need to use a more respectful, low-key style in his interactions with other people, especially in a cohesive team where all members operate on the basis of equality.
- He could enhance his level of customer service orientation. John may need to show more concern for customer satisfaction on a consistent basis.
- John may occasionally have difficulty keeping his own emotions separate from the emotions of the people he works with. He can sometimes over-identify with their problems and concerns, such that his objectivity and professionalism are undermined. John can sometimes try too hard to please everybody.
- He may sometimes become too involved in socializing and talking with other people. He may need to stay more focused on the work at hand and spend less time fraternizing.
- John definitely prefers a job that provides extrinsic rewards. As such, emphasizing the personal enjoyment and positive organizational climate will not mean much to him. For John, making money and consistently increasing his income are key factors of a desirable job.
- Though neither rigid nor set in his ways, he could sometimes be more receptive to change and innovation in the workplace. He could be more willing to try new procedures and practices on his job.
- John may occasionally need to do more to contribute to group unity and cohesion in his work group. If this job requires extensive teamwork, he may need training and coaching on team functioning.

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INTERVIEW QUESTIONS

Resource Associates highly recommends conducting a final interview prior to making an offer to hire, using this candidate's assessment results as a guide. To help with this process, we offer a set of interview questions which can help explore potential "red flags" or areas of concern. Most of these interview questions are situation-based items which ask the candidate to describe their behaviors, attitudes, and opinions while on the job. If you choose to conduct this type of interview to further investigate and clarify concerns, you should keep asking questions until you have gained confidence in your assessment of the candidate. You can use some or all of these questions during your interview. You will probably want to customize questions to best fit your style and what you already know about the candidate, as well as the job for which s/he is being considered. Some additional probes which you might want to use with individual questions are:

- * When did this take place?
- * What factors led up to it?
- * What were the outcomes?
- * What did others in the organization say about this?
- * How often has this type of situation arisen?
- * How would you handle it differently in the future?

ASSERTIVENESS

- Describe a time when you took charge of a difficult situation in your organization and turned it around into a success.
- Describe a time when you spoke up on a matter of importance to you, even though you knew it would not be well-received or when others in the company opposed you.
- Tell me about a time you took the initiative to get a project started or to complete it in a timely manner.
- What would you do if you felt that your boss had been ignoring you or not paying attention to your ideas?
- Describe a time when you successfully confronted a problem situation that others had trouble dealing with in the past.
- Tell me about a time when you effectively negotiated with upper management to get them to accept your recommendation over the recommendations of others.

CUSTOMER SERVICE

- No matter how hard you try, some customers are rude, annoying, or impossible to please. Describe the most difficult customer you have had to deal with and what efforts you made to accommodate him or her.
- Describe a situation where you went above and beyond your job description to make a customer satisfied. [Probes: What did you do? What was the outcome? How often has this type of thing happened in the last year?]
- Tell me about a time when you had to reconcile competing demands from the customer with company demands or needs.
- Tell me about a time when a customer gave you a difficult problem to solve.

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- There are limits to how far an employee should go to try to satisfy customer demands and requests. Describe the criteria you use to decide when that limit has been reached.

EXTROVERSION

- Some employees waste valuable time on their jobs chit-chatting, gossiping, and socializing. Please indicate whether this is ever a problem for you and what steps you take to avoid it becoming a problem.
- Tell me how much time you would ideally like to spend each day in meetings and discussion groups on the type of job for which you are applying.
- All of us have different styles of interacting and communicating with other people . Describe a situation where your style did not mesh well with that of another employee. [Probe: How did your styles differ? What problems did this lead to? What adjustments did you make?]
- Give me an example of a presentation that you have made where the audience was not particularly interested in the topic. What did you do? What were the results?
- Sometimes, it is hard to be objective about someone we know or like. Tell me if this has ever been a problem for you and, if so, how you dealt with it.

INTRINSIC MOTIVATION

- Tell me about what factors define success for you in a job.
- Describe how your feelings of job satisfaction are affected by how much challenge and variety you have at work.
- Tell me what you would do if your job became repetitive and routine.
- Describe the kind of work that really motivates you.
- When you think about what you get out of a job, what comes to mind?

ORDERLINESS

- All of us learn from our errors and mistakes. Tell me about the most recent error or mistake you learned from. [Probes: What was the error or mistake? What did you learn from it? What did you do to prevent it from happening again?]
- Tell me about a time when your organizational skills paid off and helped solve or prevent a problem at work.
- Sooner or later all employees have to make some trade-offs between working quickly and doing a sufficient quantity of work versus working precisely and doing work of the highest quality . Tell me about an occasion at work when you traded off quality for quantity or when time constraints forced you to compromise on thoroughness or attention to detail. [Probe: How did you feel about having to make such a trade-off?]
- Describe the most significant thing you have done to help yourself become better organized in your job.

TEAMWORK

- Describe some ways that you have helped a group of coworkers achieve an important goal or outcome.

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- Tell me about a time when you needed to work collaboratively with another department or group to achieve a common goal.
- It is hard for some people to work independently. Describe how easy or difficult it is for you to work independently or carry out assignments where you don't consult with others.
- Give some examples of ways that too much emphasis on teamwork in a company can lead to a lowered effort by individual employees or a loss of individual initiative .