



**Financial Planner Assessment
Report**

**Candidate:
Laura Sampleuser**

**Date:
05/23/2019**

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The following pages represent a report based on the results of a psychological assessment. The profile presented 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 (indicated by the shaded areas). The candidate's score is indicated by the diamond symbol: ◆

ALL RESULTS SHOULD REMAIN STRICTLY CONFIDENTIAL

	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			◆		
Overall Cognitive Aptitude				◆	

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Cognitive Aptitude Assessment

Compared to general adult norms using standardized tests which were validated for a wide range of positions, we estimate Laura's overall level of general intellectual aptitude to be in the **60-69 percentile** range. Her individual aptitude levels are:

Abstract Reasoning 40-49%ile

Numeric Reasoning Top 5%ile

Verbal Reasoning 60-69%ile

Laura has a slightly above-average level of general cognitive aptitude. She should be able to handle most of the problem-solving demands of this job in a satisfactory manner.

Explanation of Cognitive Aptitude Scores:

The aptitude scores in this section reflect percentile rankings -- not percent correct on the test. With percentiles, the average is the 50%ile. Half of the people score below this score and half score above it. As another example, if a person scores 80-89%ile on a specific test in this report, it means that they scored as well as or better than 80-89% of the norm group, but not as high as 11-20% of the norm group.

The **Overall Cognitive Aptitude** is an average of the separate aptitude sections given to this candidate.

The lower the Overall Cognitive Aptitude score, we predict that the candidate will have difficulty learning new information and making decisions. For example, if they are well experienced in their occupation, they may be able to continue to perform well practiced tasks adequately, but have difficulty learning new things. As such, they will need additional training time and more support from supervisors. People who produce lower Overall Cognitive Aptitude scores generally prefer tasks that call for specific responses rather than ones requiring insightful solutions. They are also slower in processing information and are often easily overwhelmed by complex problems, especially ones they have not dealt with before.

The higher the Overall Cognitive Aptitude 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	Ms. Sampleuser's Responses
<i>I don't like to work with people who...</i>	Answer not included in public website samples.
<i>I get annoyed at work when...</i>	Answer not included in public website samples.
<i>At times my work has suffered because...</i>	Answer not included in public website samples.
<i>I would really dislike a supervisor who...</i>	Answer not included in public website samples.
<i>People should recognize I am stressed out when...</i>	Answer not included in public website samples.
<i>It's hard to do good work when...</i>	Answer not included in public website samples.
<i>I would turn down a job if...</i>	Answer not included in public website samples.

Ideal Job	Ms. Sampleuser's Responses
<i>The most fulfilling job I had...</i>	Answer not included in public website samples.
<i>What I want most from a job is...</i>	Answer not included in public website samples.
<i>My career goal for five years from now...</i>	Answer not included in public website samples.
<i>The set of responsibilities I enjoy most are...</i>	Answer not included in public website samples.
<i>I enjoy working with people who...</i>	Answer not included in public website samples.

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Leadership Style	Ms. Sampleuser's Responses
<i>When I have to make a decision quickly...</i>	Answer not included in public website samples.
<i>My success as a manager derives from...</i>	Answer not included in public website samples.
<i>Mentoring employees who report to me...</i>	Answer not included in public website samples.
<i>Besides supervising other people, a manager should...</i>	Answer not included in public website samples.
<i>The best way to motivate people...</i>	Answer not included in public website samples.
<i>The average employee...</i>	Answer not included in public website samples.
<i>An employee who brings personal problems to work...</i>	Answer not included in public website samples.
<i>I deal with conflict in my team by...</i>	Answer not included in public website samples.
<i>To increase employee commitment I...</i>	Answer not included in public website samples.
<i>To be a valuable member of a senior management team, I try to...</i>	Answer not included in public website samples.
<i>As a leader, my greatest satisfaction at work...</i>	Answer not included in public website samples.
<i>The biggest challenge to a manager in dealing with today's workforce...</i>	Answer not included in public website samples.

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<i>When I have to reprimand or discipline an employee...</i>	Answer not included in public website samples.
<i>The organizational culture I try to create is best described as...</i>	Answer not included in public website samples.

Strategies for Success	Ms. Sampleuser's Responses
<i>The best way to get ahead in an organization...</i>	Answer not included in public website samples.
<i>The personal strengths I possess that will help me be successful in this job include...</i>	Answer not included in public website samples.
<i>Working long hours every week...</i>	Answer not included in public website samples.
<i>To better myself I...</i>	Answer not included in public website samples.
<i>My attitude about work-home balance is...</i>	Answer not included in public website samples.
<i>The key to success in my career...</i>	Answer not included in public website samples.
<i>To get ahead in a company...</i>	Answer not included in public website samples.
<i>When I am criticized...</i>	Answer not included in public website samples.

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Personality Assessment

Strengths:

- Coworkers are likely to see Laura as very easy to get along with. Laura will avoid arguments and unpleasantness whenever possible. She tries to be agreeable in her daily interactions with coworkers and other people.
- Laura has a very forceful and assertive interpersonal style. She won't let other people take advantage of her and will stand up for what she believes in.
- She is very dependable and conscientious on the job. Laura will reliably honor job expectations and commitments.
- Laura registers as having an above-average level of customer service orientation. She tries to meet customers' needs and preferences promptly. As a manager, Laura usually encourages subordinates to aim for high levels of customer satisfaction in their work.
- She is stable and well-adjusted. Laura can work well under hectic conditions and job stress.
- She tends to rely more on hard facts and objective criteria when analyzing problems and making decisions. Laura usually does not let emotional factors influence her judgment.
- Laura is extroverted, gregarious, warmhearted, and expressive. She will be an effective communicator who is attuned to social cues and interpersonal dynamics in the workplace. Laura will make an effort to establish and maintain contacts with other areas in the organization.
- Laura registers as having a high level of integrity and honesty. She is not likely to behave in ways that others would consider to be improper, dishonest, or unethical, even if it requires going out of her way to do the right thing.
- Intrinsic rewards such as personal enjoyment of her tasks are much more appealing to Laura than extrinsic features of a job such as bonuses, job status, etc. She is drawn to jobs that she finds interesting and meaningful.
- She is typically open to new ways of doing things on the job and is receptive to most forms of organizational change and innovation. Laura is motivated by opportunities to learn new job-related knowledge, skills, and abilities.
- Laura is often optimistic in her outlook. She usually expects good things from her job and the situations she encounters at work. Laura will seldom become demoralized by setbacks and will keep a positive attitude in the face of problems.
- She works carefully and accurately. She will be comfortable organizing work information and tasks.
- Laura is moderately teamwork-oriented. She usually works cooperatively with other employees, but also works well in situations calling for individual contribution and self-reliance.
- She is generally analytical and tough-minded in the way she appraises problems and draws conclusions. Laura will not give much credence to personal factors or feelings when making decisions.

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- Laura's work drive is average. She usually works hard enough to meet the demands of her job and to fit into the norms of the group in terms of trying to meet goals in a reasonable and timely manner.

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Developmental Concerns:

- As someone who aims to be known as pleasant and easy-going, Laura is likely to avoid dealing with difficult issues that would reveal underlying conflict or disagreement. She will have a tendency to go along with the majority no matter what her own opinion.
- Laura can sometimes be too aggressive or overbearing. She may need to be more low-key and respectful when trying to persuade or convince other people. Some employees may feel that she assumes too much authority on her own without sanction from management.
- Laura may have difficulty in gaining rapport with the people she works with because of her reluctance to identify on any emotional level with them. Also, her decision-making may suffer in some situations because of her failure to consider the feelings and emotional states of other people.
- Laura may sometimes be too socially distractible and overly influenced by interpersonal cues. She may spend too much time talking or interacting with others on the job when she should be focusing on the work at hand.
- She could more actively cooperate and collaborate with other employees. There may be times when Laura places too much emphasis on individual contribution rather than group accomplishment.
- She may sometimes fail to notice and consider the thoughts and feelings of the people she works with. Laura may occasionally lack empathy and insight into their emotional states and concerns.
- Laura may sometimes need to work longer hours and extend herself for her job. She may need to put more time and effort into her work.

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INTERVIEW QUESTIONS

After reviewing the assessment results for this candidate, you may want to conduct a structured interview to further explore and clarify some specific concerns. The interview questions listed below reflect areas of concern raised by the assessment results. 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 when interviewing the candidate. You will probably want to customize these 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. Most of these are behavioral description items which ask the candidate to describe specific behavior on the job. 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?

AGREEABLENESS

- Tell me about a project that required everybody to get along smoothly and harmoniously. What did you do to help promote harmony and cohesion?
- Sometimes it is good to question or challenge the ideas or decisions of the people you work with, even if it leads to disagreement or an argument. Tell me about a time when you have done so.
- Describe a situation where you took a stand on something that was not necessarily popular with other people, but where you felt it was the correct thing to do?
- Tell me about a situation where you went along with the group (or with individual coworkers) just to keep the peace, preserve harmony, or show support, even though you did not agree with them.
- Conflict seems to be inevitable in most work settings as business competition increases and more demands are made on all employees. Tell me about a conflict or disagreement you had with another employee? [Probes: What was the nature of the problem? What did you do to help resolve it? How often has this occurred?]

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.

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- Tell me about a time when you effectively negotiated with upper-management to get them to accept your recommendation over the recommendations of others.

EMPATHY

- Tell me about a time when you were able to establish rapport with a “difficult” person.
- Tell me about a time when you counseled an employee (or peer) who was going through a difficult time. What was the problem? What did you do? What was the result?
- Describe a time when someone at work responded emotionally to something you said or did. How did you respond? What was the result?

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 for us 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 which 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.

ORDERLINESS

- Tell me about a time when you organized the elements or parts of a project into a larger whole and came up with an integrated system.
- Describe how you use details to make plans and develop long-term strategies.
- Tell me about a time when you were so focused on details that you got bogged down and spent too much time on a task or assignment.
- Describe your approach to doing long-range planning and strategic development on your job.

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TOUGH-TENDER-MINDED

- Describe a time when you made an important decision based primarily on an objective analysis of facts and data. (Compare the candidate's answer on this question with answers to the next question in terms of level of detail and enthusiasm.)
- Describe a time when you made an important decision based on your personal feelings, values, and intuition.
- Describe a situation where you dealt with an employee (or peer) who was consistently negative in meetings or when interacting with other employees. What did you do? What were the results?
- Describe a time when someone at work responded emotionally to something you said or did. How did you respond? What was the result?

WORK DRIVE

- Under what conditions, if any, do you think a company has a right to ask its employees to work long hours? What is the upper limit for you on how many hours/week you are willing to work on an ongoing basis to meet the demands of your job.
- Describe some ways that you think your commitment to your family or personal life away from the job may have limited your advancement opportunities or earnings potential. How do you feel about this?
- What are the potential problems associated with a company expecting too much overtime from their employees or encouraging them to become workaholics?
- Describe how you keep work separate from your home and personal life and how you keep job demands from intruding on your free time.
- Under what situations would you be willing to work overtime and weekends for your job? How long would you be willing to do so?

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