TARKENTON FINANCIAL

Know your Women, Money, and Power® financial personality

Better financial strategies start with better knowledge of you

This questionnaire was designed to help you identify your financial personality. Understanding your particular needs also will allow your financial professional to better understand you, and in turn, better understand your decision-making process and personal approach to preparing for your financial future. Please take your time and carefully answer each of the following eight questions.

Using the following scale, how much do you agree or disagree with the following statements?

	Strongly agree	Somewhat agree	Neutral	Somewhat disagree	Strongly disagree	POINTS
I feel I am confident when it comes to managing money and investing.	5	4	3	2	1	
I feel I have adequately planned for retirement savings/security.	5	4	3	2	1	
I feel I am educated when it comes to managing money and investing.	5	4	3	2	1	
I feel I have sufficient knowledge about money and investing, and I am very involved in the management of my long-term savings and investments.	5	4	3	2	1	
I feel I am clear about my financial goals and my plans to achieve them.	5	4	3	2	1	
I feel I am highly responsible and take initiative when it comes to money and investing.	5	4	3	2	1	
It is very important to me that I always have a complete understanding of my household financial situation.	5	4	3	2	1	
When in a relationship, I like to collaborate with my partner in financial decisions.	5	4	3	2	1	
					TOTAL POINTS	

TOTAL POINTS	8-13	14-19	20-26	27-34	35-40
FINANCIAL PERSONALITY	Financial **dreamer**	Financial **avoider**	Financial **collaborator**	Financial **analyzer**	Financial **initiator**

Financial **initiator**

You're self-assured, empowered, and optimistic in most of your endeavors. Specifically, you're extremely sophisticated in your financial knowledge and confident in your ability to make independent, informed financial decisions. You're quite clear about your financial goals and typically know how to achieve them. You take the initiative to work with a financial professional you feel has the necessary industry experience and expertise to provide you exceptional guidance.

Financial **analyzer**

You have a good understanding of household finances and take initiative in thoroughly researching investment opportunities and tracking financial results. You're a comparison shopper, an avid saver, and rarely purchase something you can't afford. Your behavior is reflective of an analytical and disciplined approach to making decisions. Chances are you've worked with a financial professional in the past. However, when selecting a financial professional, it's important to you to work with someone who includes you and collaborates with you.

Financial **collaborator**

You're extremely balanced in your life. When in a relationship, you're healthy, happy, and cooperative. You provide your family financial comfort and stability. You are confident in your ability to understand and resolve financial issues. However, you prefer not to be the primary decision-maker. Even though you may not always choose to be in the forefront, you and your partner share equally in all financial decisions and actions, including working with a financial professional.

Financial **avoider**

You're concerned about your current finances and your financial future. However, you don't feel confident enough in your financial knowledge to make informed, independent decisions to resolve your financial problems. You often feel overwhelmed by all the choices and potential solutions available to you. You know that you would benefit by seeking the help of a financial professional. You just have trouble taking the first step.

Financial **dreamer**

You haven't had a confident history with money. In fact, you may not have had the opportunity to be responsible for your own money and investing in the past, and as a result may feel intimidated when it comes to managing your own finances. Because you lack experience and knowledge, you may feel helpless and hope that someone else will "take care of you." In fact, if you're in a relationship, you usually defer all financial matters to your partner. You have the most to gain by consulting with a financial professional with whom you feel comfortable and whom you can trust.

The emerging roles of financially empowered women

Thank you for completing the financial personality worksheet. Now that you have a better understanding of your unique financial personality, you can become more in tune with your behaviors as they relate to money and finances. This knowledge will position you to take the next step of working with a financial professional, and will help you assume control of your financial future.

When interpreting your results, please keep in mind that you are the best judge of the accuracy of a personality description that reflects your financial behavior. If your point score falls toward the end of a range of points for a particular financial personality, and you feel that behavioral description does not accurately portray you, read the personality description that follows it to determine if it's a better fit.

The Allianz Women, Money, and Power® financial strategies study was commissioned by Allianz Life Insurance Company of North America. Allianz Life Insurance Company of North America (Allianz) and Allianz Life Insurance Company of New York (Allianz Life of NY) are affiliated companies.

Allianz Life Insurance Company of North America, Allianz Life Insurance Company of New York, and Allianz Life Financial Services, LLC do not provide financial planning services.

Guarantees are backed solely by the financial strength and claims-paying ability of the issuing insurance company. Registered index-linked annuity guarantees do not apply to the performance of the variable subaccount(s), which will fluctuate with market conditions.

Products are issued by Allianz Life Insurance Company of North America, 5701 Golden Hills Drive, Minneapolis, MN 55416-1297. 800.542.5427. www.allianzlife.com. In New York, products are issued by Allianz Life Insurance Company of New York, 1633 Broadway, 42nd Floor, New York, NY 10019-7585. www.allianzlife.com/new-york. Registered index-linked annuities are distributed by their affiliate, Allianz Life Financial Services, LLC, member FINRA, 5701 Golden Hills Drive, Minneapolis, MN 55416-1297. Only Allianz Life Insurance Company of New York is authorized to offer annuities in the state of New York.

• Not FDIC insured • May lose value • No bank or credit union guarantee • Not a deposit • Not insured by any federal government agency or NCUA/NCUSIF