



Moshides Financial Group

Your Guide to Financial Security

Name

Date

Score
0

Mindsets	1	2	3	4	5	6	7	8	9	10	11	12	Score
1 BIG AMBITION	You feel your best days are behind you and tend to focus on the negative. You have run out of future.			You have trouble being excited by the future due to it's uncertainty.			Your primary concern is maintaining the lifestyle and professional status you have attained.			You are interested in growth & having a bigger future & are willing to break out of your comfort zone to achieve it.			
2 RELATIONSHIP ORIENTED	You don't trust many people so you try to rely on others as little as possible and don't enjoy much interaction w/ others.			You have a few close relationships but depend mostly on yourself often to your chagrin.			You recognize the importance of collaboration & maintaining the relationships w/ those who have helped you get there.			You value relationships with others who prove their value & are committed to your continued growth.			
3 OPEN TO CHANGE	You find change difficult and have very little interest in deviating from the way you have always done things.			You recognize you need to change your thinking but are not sure how and who to turn to.			You keep an open mind and are willing to make changes when things are brought to your attention.			You are looking for a professional partner who brings new ideas and concepts to consider.			
4 DELEGATOR MINDSET	You feel if something needs to be done properly you must do it yourself and find delegation difficult.			You feel guilty passing things off to others and regularly question the ability of others versus yourself.			You recognize delegation makes sense and take advantage of it in certain areas of your life.			You recognize talent in others which allows you to have a better quality life with greater simplicity.			
5 PROCESS ORIENTED	You tend to shoot from the hip and have very little structure leaving your results unpredictable.			You see the value in being structured but tend to believe the end result is due to chance or luck.			You believe in processes and systems within most areas of your life.			You appreciate a defined system to meet your goals / dreams & choose not to leave things to chance.			
6 GOAL DRIVEN	You do not establish goals and feel others who do are foolhardy.			You feel somewhat guilty setting goals for self improvement and growth.			You believe in goal setting and have experienced results that have exceeded your expectations.			You believe the future has more promise than the present & look for ways to improve your life.			
7 LEAVING A LEGACY	You care very little about what happens when you are gone and have no interest in leaving an impact on society.			You are focused on the present and think little about the next generation as you look to secure your future.			You have achieved much in life and recognize you have more than you need and legacy planning is appealing.			You live by the principle of helping your loved ones, impacting society & making the world better than you found it.			
8 COURAGEOUS	You are resistant to change and are caught in a comfort zone you cannot escape..			You recognize opportunity but find it difficult to take action due to discomfort associated with change.			You have been courageous many times in the past but now are reluctant to be so.			You are future based in your thinking and have great courage and interest in changing with the times.			
Scorecard													0

The Optimum Maximizer, Page 1 of 1. This form is for the sole use of John Moshides.