



# Tools For Conducting Financial and Behavioral Assessment for Clients or Concerned Persons

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# Assessment Tools

- Purpose
  - To visually describe the nonphysical structure (composition of the habituated functional pattern)
  - To visually describe the financial structure
  - To identify goals on treatment plan to guide rebalancing of how client expresses and place presence, power, and energy in transactions when using money to meet financial needs

# Assessment Tools

- A Case Study: Jack and Jill
  - Will be used to demonstrate how to use the assessment tools to identify and describe
    - the structural break in the nonphysical functioning of the relationship
    - that allows the negative financial consequences to express on the cash flow and net worth statement

# Assessment Tools

- Case Study Group Activity
  - Divide into two groups
    - Group 1: Left side
    - Group 2: Right side
  - Groups 1 and 2 will divide into subgroups
    - Nonphysical
    - Financial

# Assessment Tools

- Case Study Situation
- Nonphysical Assessment Tools
  - V Chart
  - Composition of the Nonphysical Self
  - Healthy Interactions
  - Frustrating Interactions
- Financial Tools
  - Paycheck Planning Worksheet
  - Seasonal Expenses
  - Cash Flow Worksheet
  - Debts/Liabilities
  - Net Worth Statement

# Assessment Tool

- Composition of the Nonphysical Self
  - The amount of money we have is the outcome of the choices we make and actions we take with our money
    - Money actions = the way we activate COS, EDS, EAS to use power to engage energy to express personal presence
    - Determines how we use cash flow to build net worth

# Assessment Tool

- Character Operating System =
  - F(c + b + d + w + t + f + o + p + r + d + a + r)
- Energy Distribution System
  - Urge > Need > Solution > Action > Consequence > Outcome
- Energy Activation System
  - Agency + Autonomy + Authority + Decision + Responsibility + Accountability
- Quality influenced by placement of PPET within or without
  - Conscious or unconscious; habituated or discerned; inclusive or exclusive, willing or unwilling





# Assessment Tool

- If pattern is realized and changes made
- Person 1
- 1 1 1 1 ☺
- $U > N > S > A1 > A2 > A3 > A4 > C > O$
- 2 2 2 ☺
- Person 2
- Outcome if pattern is interrupted and changes made by both; can find way through and have better financial outcomes

# Assessment Tool

- If one or more parties unwilling to continue in relationship
- Person 1
- 1 1 1 1 1 1 ☺ ☹
- U > N > S > A1 > A2 > A3 > A4 > C > O
- 2 ☹ ☹
- Person 2
- Outcome if pattern continues; divorce

# Assessment Tools

- Group Assignment
  - Use PPET scan to locate and describe the structural break where presence, power, and energy in a transaction (PPET) leave the host where it was naturally vested and transfer to the partner
    - Describe husband's behavior pattern formation
    - Describe wife's behavior pattern formation
    - Describe how "the deal" takes place using the components of the nonphysical functioning structure
  - Identify dollar amount of financial assets and liabilities
  - Identify needs so they can start over using a healthier combination of nonphysical and financial functioning to create a positive relationship
    - Identify 3 nonphysical needs that can be formed into goals on tx plan to help rebalance placement of PPET
    - Identify 3 financial needs that can be formed into goals on tx plan to help rebalance placement of PPET
  - Share your groups answers

# Assessment Tools

- Money management is the process of managing the self when using money to meet needs
- Change frustrating to healthy outcomes
  - Rebalance how presence, power, and energy are placed and expressed in financial transactions
  - Experience healthier financial outcomes

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