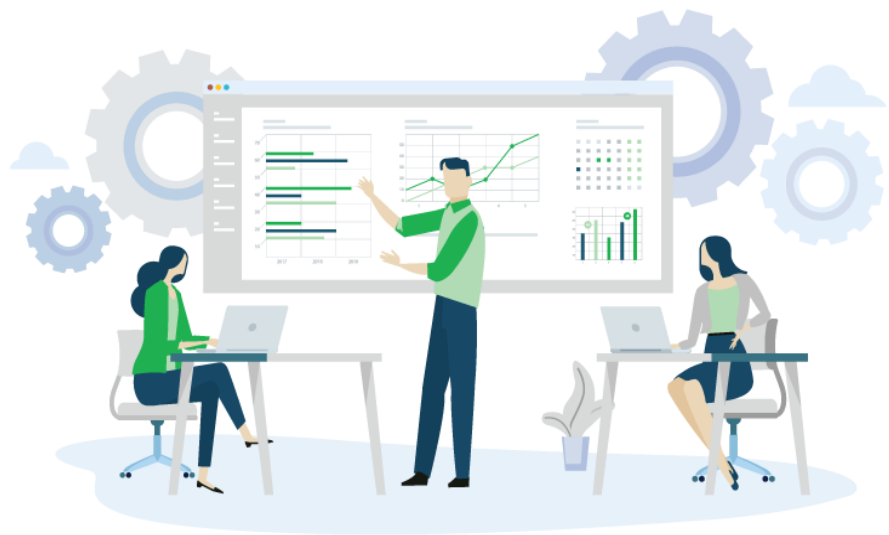

Simone Sample

Finance Roles

Finance Competency Report



Report Information

This report has been generated using results from the Test Partnership Finance Roles, which analyses a person's personal preferences, motives, and behavioural tendencies.

This report presents personality scales based on the candidate's own responses to behavioural questions. Research has shown that the self-reporting measures used in this questionnaire are a valid measure of how people behave in the workplace.

Scales have been generated by comparing the candidate's responses with the responses of thousands of other people, to give a comparison of personality traits in the form of sten scores.

Sten scores of 4, 5, 6, or 7 are considered to be within an 'average' range for the comparison group, whilst higher and lower sten scores suggest stronger and weaker preferences compared with the comparison group. It is important to note that low sten scores do not necessarily mean poor performance; they just mean a low tendency to exhibit that particular personality trait. Indeed in some roles it is preferable to display low tendencies towards certain personality traits.

The information contained in this report is confidential and should be stored securely.

The information in this report is likely to remain valid for up to 24 months from the date of taking the questionnaire.

Disclaimer

This report has been computer-generated and it cannot be guaranteed that this report has not been changed or adapted from the original computer-generated output. If the test was completed without supervision, the identity of the test-taker cannot be guaranteed.

Test Partnership accept no liability for the consequences of the use of this report.

Report Sections

Full Personality Scales

This section gives a detailed view of the candidate's full personality profile presented on 20 scales. By providing a spectrum of personality traits, it's possible to focus on particular aspects of the candidate's personality.

Summary Personality Profile





Since it's sometimes impractical or unnecessary to analyse every one of the personality traits contained in the first section, this summary profile recasts the candidate's personality traits in an aggregated, more tailored format for alternative interpretation.

Summary Personality Profile Report





These pages act as narrative to support the Summary Personality Profile section. The report describes how the candidate's responses relate to each of the summary markers, and what their preferences indicate in practice.

Full Personality Scales Report





Achievement-Oriented

| | | |
|--|--|---------------------------|
| <p>Drive An individual's desire to succeed or excel in everything they do, often seeking to outperform others.</p> |  | <p>Well below average</p> |
| <p>Goal Focus An individual's preference for setting and achieving goals, gaining satisfaction from reaching targets.</p> |  | <p>Well below average</p> |
| <p>Perseverance An individual's propensity to see long-term projects through to completion, even in the face of adversity.</p> |  | <p>Well below average</p> |
| <p>Persistence An individual's likelihood of seeing a task through to completion, despite challenges, setbacks and obstacles.</p> |  | <p>Average</p> |





Communication and Influence

| | | |
|---|--|---------------------------|
| <p>Assertive An individual's propensity to take control of social situations and feel comfortable speaking their mind.</p> |  | <p>Below average</p> |
| <p>Outgoing An individual's affinity with others, warmth towards strangers and interest in interpersonal communication.</p> |  | <p>Average</p> |
| <p>Positive Expression An individual's awareness and recognition of positive emotion, feeling able to express this to others.</p> |  | <p>Well below average</p> |
| <p>Social Tact An individual's propensity to be careful, deliberate, and savvy when engaging in meaningful social interaction.</p> |  | <p>Well below average</p> |





Objective and Rational

| | | |
|--|--|---------------------------|
| <p>Complexity An individual's likelihood of understanding, appreciating, and preferring complex and abstract information.</p> |  | <p>Below average</p> |
| <p>Free-Thinking An individual's propensity to question convention and tradition, in favour of alternative approaches.</p> |  | <p>Well below average</p> |
| <p>Inquisitive An individual's propensity towards curiosity, acquiring new information and further understanding.</p> |  | <p>Well below average</p> |
| <p>Perspective An individual's propensity to take a broad view of the world, focus on the big-picture, and prioritise the important things in life.</p> |  | <p>Well below average</p> |

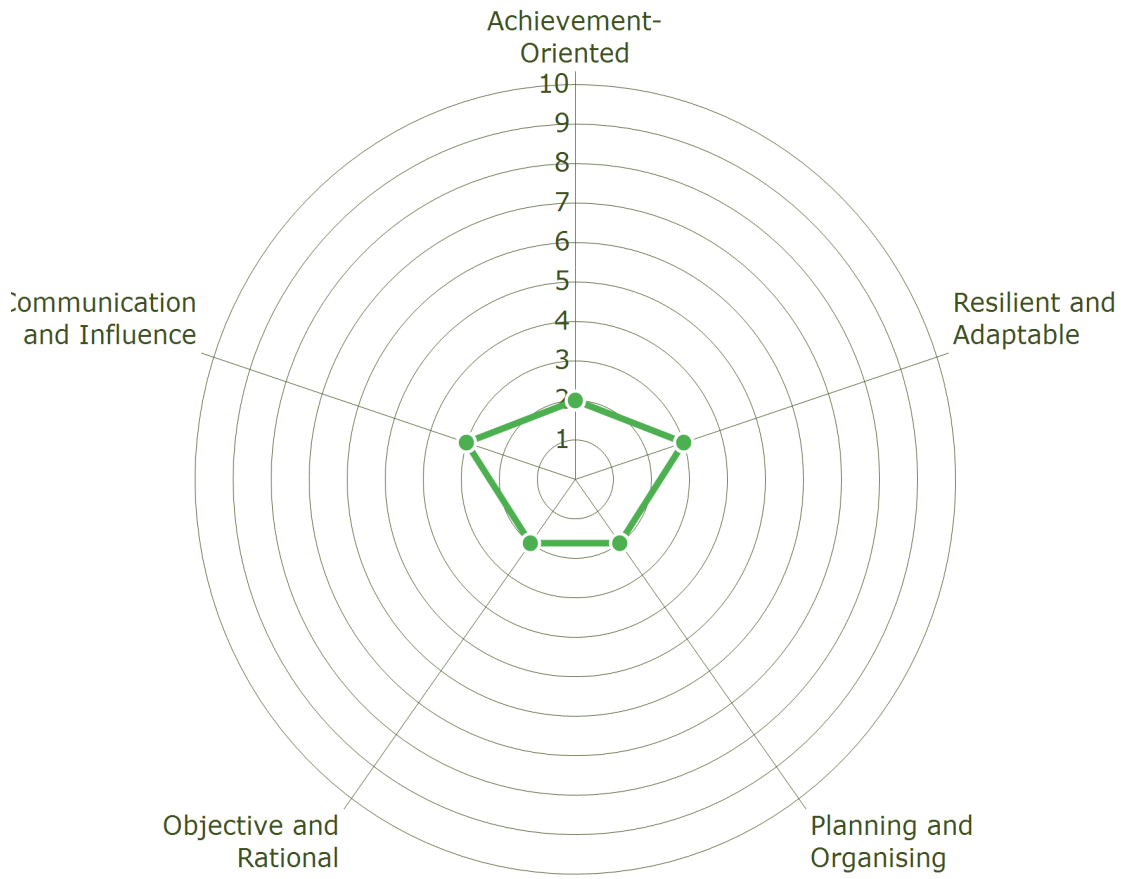
Planning and Organising

| | | |
|--|--|--------------------|
| <p>Diligence An individual's propensity to follow the rules, uphold procedure and fulfil their obligations.</p> |  | Well below average |
| <p>Discipline An individual's likelihood to remain productive and maintain focus during necessary day-to-day tasks.</p> |  | Well below average |
| <p>Methodical An individual's attention to detail and their propensity to conduct tasks in a meticulous way.</p> |  | Average |
| <p>Vigilance An individual's consideration of consequences and avoidance of impulsive decision-making.</p> |  | Well below average |

Resilient and Adaptable

| | | |
|--|--|--------------------|
| <p>Collected An individual's emotional consistency, rarely experiencing mood swings or negative emotional reactions.</p> |  | Well below average |
| <p>Confidence An individual's level of belief concerning their capability to overcome obstacles, setbacks and deterrents.</p> |  | Below average |
| <p>Self-Directed An individual's likelihood to feel in control, rarely feeling powerless over their life's direction.</p> |  | Well below average |
| <p>Self-Esteem An individual's perceived self-worth, concerning positive self-image and recognition of their own worth.</p> |  | Average |

Summary Personality Profile



Achievement-Oriented

Score: **2**

Achievement-Orientation relates to a finance professional's level of drive, motivation, and desire to achieve their set objectives. It also suggests a high level of persistence, helping them to remain motivated in the face of obstacles.

Achievement-orientation is an important trait for anyone working in the finance industry because it drives individuals to set and achieve goals, persist through difficulties, and continuously improve their performance.

In finance, setting and achieving goals is essential for success. Financial professionals must be able to set and achieve short-term and long-term goals for themselves and their clients. This includes setting financial targets, creating financial plans, and consistently working towards achieving those goals.

Achievement-orientation also helps financial professionals to stay focused and motivated, even when faced with challenging circumstances or obstacles.

Financial professionals must be able to identify and capitalise on opportunities, as well as take the lead in creating and implementing new ideas. This requires them to be proactive, identify new opportunities, and act on them quickly. Achievement-oriented individuals are more likely to be driven and motivated, which is essential for success in the fast-paced and ever-changing finance industry.

Continuous improvement is also crucial in finance. Financial professionals must be able to adapt to new regulations, technologies, and market conditions. They must be willing to learn and grow and be open to feedback, in order to improve their performance and stay ahead of the competition.

Achievement-oriented individuals are more likely to be open to feedback, actively seek out new learning opportunities and are committed to continuously improving their performance.

Moreover, achievement-orientation is vital in finance because it helps professionals to overcome setbacks and challenges. The finance industry is known for its volatility and uncertainty. Financial professionals who possess an achievement-orientation mind-set are more likely to be persistent and to bounce back from setbacks and challenges.

In conclusion, achievement-orientation is an important trait for anyone working in the finance industry. It drives individuals to set and achieve goals, take initiative, continuously improve their performance, and adapt to the ever-changing market conditions. Financial professionals who possess an achievement-orientation mind-set are more likely to be successful and driven in their careers.

This score indicates a low level of the Achievement-Orientation competency, relative to the chosen norm group for this assessment.

Communication and Influence

Score: **3**

Communication and Influence related to a finance professional's propensity to express themselves clearly and confidently. It also suggests a certain degree of interpersonal skill, helping them to navigate the interpersonal domain.

Communication and influence are essential skills for anyone working in the finance industry, as they are key to building and maintaining relationships with clients, colleagues, and other stakeholders. Effective communication is essential in finance, as it allows financial professionals to clearly and concisely explain complex financial concepts and strategies to clients. This is important for building trust and ensuring clients understand the financial process and their options. Good communication skills also help financial professionals negotiate deals and resolve conflicts, as they are able to articulate their clients' position and advocate for their interests.

In addition, good communication skills are essential for building and maintaining relationships with colleagues and other stakeholders. Financial professionals often work in teams and need to be able to collaborate effectively with others. This includes communicating effectively with clients, other financial professionals, regulators and other stakeholders.

Influence is also an important skill for finance professionals. They must be able to persuade others, including clients, colleagues, and managers, to accept their arguments and decisions. This requires a combination of clear, persuasive communication and the ability to build relationships based on trust and respect. Financial professionals must also be able to navigate conflicting interests and find common ground. This is important for resolving conflicts and reaching deals that are in the best interest of all parties involved.

Moreover, communication and influence are important when working in finance because it helps financial professionals to create and maintain a positive image of themselves and their firm. A financial professional who is able to communicate effectively and influence others is more likely to be seen as a knowledgeable and respected professional. This can lead to more clients and better opportunities for advancement.

In conclusion, communication and influence are essential skills for anyone working in the finance industry. They are key to building and maintaining relationships with clients, colleagues, and other stakeholders, resolving conflicts and reaching deals, and creating and maintaining a positive image of themselves and their firm. Financial professionals who possess these skills are more likely to be successful in their profession.

This score indicates a low level of the Communication and Influence competency, relative to the chosen norm group for this assessment.

Objective and Rational

Score: **2**

Objective and Rational relates to a finance professional's propensity to think clearly, unencumbered by irrational thoughts or hot cognition. It also suggests a degree of intellectual breadth, helping them to understand complexity.

Being objective and rational is important when working in finance because it allows individuals to make informed, unbiased decisions, and to avoid emotional and impulsive reactions.

In finance, decisions are often based on complex and large amounts of data, and it is essential for financial professionals to be able to analyse, evaluate and process this data objectively and rationally. This allows them to identify patterns, trends, and relationships that may not be immediately obvious, and to make informed, unbiased decisions. Objectivity and rationality also helps professionals to avoid the influence of personal biases and emotions, which can lead to impulsive and poor decision making.

Furthermore, being objective and rational is important in finance because it helps professionals to evaluate and manage risk. Financial professionals must be able to evaluate and manage the potential risks associated with financial transactions and investments. This requires them to be able to analyse data, assess probabilities, and make decisions based on facts and evidence, rather than emotions or personal biases.

Additionally, being objective and rational is important in finance because it helps professionals to be more effective communicator and negotiator. Financial professionals must be able to explain complex financial concepts and strategies to clients and other non-experts in a clear and concise manner. Being objective and rational allows them to present information in a logical and easy to understand way, which can help to build trust and credibility with clients.

Moreover, being objective and rational is important in finance because it helps professionals to stay focused and motivated, even when faced with challenging circumstances or obstacles. This is important for maintaining motivation and focus, even when faced with difficult circumstances or obstacles.

In conclusion, being objective and rational is important when working in finance because it allows individuals to make informed, unbiased decisions, evaluate and manage risk and be more effective communicator and negotiator. Financial professionals who possess these traits are more likely to be successful in their careers, and to be able to handle the challenges that come with working in such a dynamic industry.

This score indicates a low level of the Objective and Rational competency, relative to the chosen norm group for this assessment.

Planning and Organising

Score: **2**

Planning and Organising related to a finance professional's propensity to display a structured, methodical, and organised approach to their work. It also suggests a certain degree of cautiousness when making decisions, avoiding impulsivity.

Planning and organising are important when working in finance because they allow individuals to effectively manage their time and resources, set and achieve goals, and make informed, careful decisions.

In finance, setting and achieving goals is essential for success. Financial professionals must be able to set and achieve short-term and long-term goals for themselves and their clients. This includes setting financial targets, creating financial plans, and consistently working towards achieving those goals. Planning and organising skills are crucial in this process, as they allow professionals to prioritise tasks and set a clear course of action to achieve their goals.

Furthermore, planning and organising are important in finance because they allow professionals to effectively manage their time and resources. Financial professionals often have to deal with large amounts of data and need to prioritise their time and resources to complete their work effectively. Planning and organising skills are essential for managing time and resources efficiently and effectively. They allow professionals to prioritise tasks, set deadlines, and manage their workloads effectively.

Additionally, planning and organising are important in finance because they help professionals to be more reliable communicators and negotiators. Financial professionals must be able to explain complex financial concepts and strategies to clients and other non-experts in a clear and concise manner. Being organised and having a clear plan allows them to present information in a logical and easy to understand way, which can help avoid unnecessary mistakes or errors.

Moreover, planning and organising are important in finance because they help professionals to make informed and efficient decisions. Financial professionals must be able to analyse large amounts of data, assess probabilities, and make decisions based on facts and evidence. Planning and organising skills allow them to keep track of important data, evaluate different options, and make informed decisions in a timely manner.

In conclusion, planning and organising are important when working in finance because they allow individuals to effectively manage their time and resources, set and achieve goals, make informed, efficient decisions, and meet any essential deadlines or targets. Financial professionals who possess these skills are more likely to be successful in their careers, and to be able to handle the challenges that come with working in finance.

This score indicates a low level of the Planning and Organising competency, relative to the chosen norm group for this assessment.

Resilient and Adaptable

Score: **3**

Resilient and Adaptable relates to a finance professional's propensity to manage stress, avoid burnout, and adapt to disruptive change. It also suggest a high level of external attribution, helping protect their sense of self-worth and competence.

Being resilient and adaptable are essential traits for anyone working in the finance industry because they allow individuals to effectively navigate and adapt to the constantly changing market conditions and unexpected events.

The finance industry is known for its volatility and uncertainty. Financial professionals must be able to anticipate and respond to changes in the market, economy, and regulations. They must be able to quickly adapt to new information and make decisions that can have significant financial consequences. Resilience and adaptability are crucial for professionals in this field, as they allow them to remain calm and level-headed in the face of unexpected events, and to make decisions that are in the best interests of their clients and their organisation.

Furthermore, being resilient and adaptable is important in finance because it helps professionals to overcome setbacks and challenges. The financial industry is a highly competitive and demanding field, and individuals must be able to bounce back from setbacks and continue to perform at a high level. Resilience and adaptability are essential for maintaining motivation and focus, even when faced with difficult circumstances or obstacles.

Additionally, being adaptable also allows financial professionals to continuously learn and improve. The finance industry is constantly evolving, and professionals must be willing to learn new skills and technologies to keep up with the latest developments. They must be open to new ideas and ways of working, and be able to apply their knowledge and skills in different contexts. Adaptability is key to keeping up with the ever-changing market conditions and regulations.

Moreover, resilient and adaptable individuals tend to be better equipped to work in a diverse and multicultural environment. They are more likely to be open to different perspectives and ideas, and are more effective at collaborating with people from different backgrounds. In a globalised industry such as finance, this skill is important for success.

In conclusion, being resilient and adaptable are essential traits for anyone working in the finance industry. They allow individuals to effectively navigate and adapt to the constantly changing market conditions and unexpected events. Financial professionals who possess these traits are more likely to be successful in their careers, and to be able to handle the challenges that come with working in such a dynamic industry.

This score indicates a low level of the Resilient and Adaptable competency, relative to the chosen norm group for this assessment.