

The Wall Street Coach™

**THE  
TRADER  
POSITIONING  
INDEX**

[THEWALLSTREETCOACH.COM](http://THEWALLSTREETCOACH.COM)

# THE TRADER POSITIONING INDEX

**The tool can increase leadership team excellence by 420% and is repeatedly used to create best performer models within global organizations worldwide.**

The Trader Positioning Index is one of the most powerful leadership development tools for traders and their teams. It helps leadership teams and senior-level traders understand decision-making pathways in order to create more progress, more profit, and secure more overall success without buckling under stress. This assessment from The Wall Street Coach will come with options of personal and team results-review coaching sessions so you can drill into strengths and weaknesses to fully realize your leadership success story.

The Trader Positioning Index evaluates and identifies how individuals and leadership teams use their values system to make decisions in their work and personal life, which gives great insight into their likely behaviors in various situations. This knowledge can enhance performance in an array of critical areas, including improved **recruitment, retention, and engagement**, as well as increased **leadership, innovation, and morale**.

The Trader Positioning Index is not a personality assessment – it is an assessment of one's judgment and how one values various aspects of their work, personal life, and the world. An individual's judgment is crucial in the choices one makes and how they work with others and operate within a team. Judgment is not something a person has, **it is who they are**. It evolves throughout our lives and is influenced by every event, experience, and individual who touches our lives. Our values are the lens through which we see the world and make decisions. The Trader Positioning Index measures how well developed and how well we utilize that value system to make effective decisions.

The Trader Positioning Index Assessment with The Wall Street Coach includes individual and team reports, optional one-on-one reviews for each participant, team reviews with all participants, and DIY explanations for individuals.

The Trader Positioning Index is an online assessment that takes approximately 10-15 minutes to finish. Reports included:

- Blue Diamond Score Sheet and Personal Narrative
- Engagement Group Report
- Team Leadership Strength Report

# THE TRADER POSITIONING INDEX

## SAMPLE REPORTS

### Blue Diamond Score Sheet

The Blue Diamond Score Sheet is like looking at the DNA of an individual's value system. On this score sheet, we can measure and identify one's strategic planning, value of work, relational insight, self-motivation, and so much more, which can give insight into areas of strength, weakness, frustration points, and opportunities for growth.

<b>JUDGMENT INDEX™ SCORE SHEET</b>																																																																																																											
Name: Sample Sample	Date: 3/25/2019																																																																																																										
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Balance of Judgment - the tendency to Under Value(-) or Over Value regarding:																																																																																																											
 1 People / Relationships	 -3 Work / Tasks	 2 Balance with Ideas	 -10 Self-Esteem Self-Confidence	 -7 Self-Concept Role Satisfaction	 17 Self-Image Self-Motivation																																																																																																						
PRIMARY Judgment Type = (4) Counseling/Coaching/Mentoring      FRINGE Type = (12) Developing People																																																																																																											
Tends to view self as UNIQUE. (Part 2 IES = 14, 18, 25)																																																																																																											

P1:IES:6,5,18 DIFQ:55 VQ1:43 VQ2:21 P2:IES:14,18,25 IOA3B37

# THE TRADER POSITIONING INDEX

## SAMPLE REPORTS

### Engagement Group Report

The Engagement Group Report takes key elements of engagement from individuals' scores, such as morale, drive, role satisfaction, and dependability, and curates the data from an entire team to identify strengths, hindrances, and blindspots within an organization.

Kim Curtin Engagement		Engagement Index										Sort Order: Alphabetically by Group	
		Individual scores are points earned. 8 = strongest 1 = weakest											
Name	Perspective	Personal Reserves			Stressors			Personal Orientation			Total % Possible	Category	
Group Average	7 7 7	7	7	6	4	8	7	8	7	7	82	Routine Engagement - 85%	
1. Sample Profile	8 7 8	8	8	8	8	8	6	7	7	6	89	High Engagement - 93%	
2. Sample Sample	7 7 5	7	8	6	1	8	7	8	7	8	79	Routine Engagement - 82%	
3. Sample Sample	7 7 6	5	6	6	3	8	8	8	8	4	76	Routine Engagement - 79%	
4. Sample Test	6 6 6	5	6	4	1	8	8	8	8	8	74	Random Engagement - 77%	
5. Sample Wilson	7 6 8	8	8	8	8	8	8	7	7	7	90	High Engagement - 94%	

### Team Leadership Strength Report

The Team Leadership Strength Report builds a robust breakdown of an entire team's averages in areas of their work and personal life to quickly focus on areas of strength and weakness across an entire team, as well as for the individuals that make up the team.

Kim Curtin Leadership Qualities - Leadership Qualities		Sort Order: Strength, Name																																
		Passion to Lead				Ability to Inspire				Ability to Select Quality People		Resilience		Courage		Instruction		Trustworthy		Managing Relationships		General Competence Decisions		Plan and Execute		Obstacles to Leadership Performance		Time (minutes)						
		Interpersonal Skills	Work Task Skills	Strategic Skills	Problem-Solving Ability	Focus and Concentration	Assertiveness	Tolerance to Differences in Others	Caring / Empathy / Compassion	Meaningfulness of Work	Personal Counselor / Solve Own Problems	Speaking with Conviction	Self-Esteem / Self-Confidence	Understanding Work Issues / Transparency	Work Ethic / Dependability	Intuitive Sensitivity	Problem-Solving Energy	Sense of Self / Role Identity / Change	Speaking Openly and Honestly	Recognizing / Following Instructions	Balance Toward People	Balance Toward Work	Balancing Toward Decision-making	Noticing, Sensing and Awareness	Acceptance of Different People and Ideas	Relational Savvy and Skill	Ability to make Critical Decisions	Big Picture Insight	Strategy and Big Picture Skills	Process and Task Judgment	Professional Life Stress Management	Personal Life Stress Management	Self-Criticism, TOO Hard on Self / Others	Dealing with Difficult People / Situations
Group Average		Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	12		
1. Sample Test		Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	28		
2. Sample Wilson		Moderate	Moderate	Weak	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	15		
3. Sample Profile		Strong	Moderate	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	3		
4. Sample Sample		Weak	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	5		
5. Sample Sample		Strong	Moderate	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	7		

# THE TRADER POSITIONING INDEX

## MEET THE EXPERT



### **Kim Ann Curtin**

Kim is the founder and CEO of The Wall Street Coach, a trader & executive coaching & leadership development firm. Prior to becoming an coach 18 years ago, she spent a decade in finance. Kim has worked with traders and executives from Bank of America, Blackstone, FINRA, Genentech, GIC, King Street Capital, L'Oréal, Merck, NBC, and Procter & Gamble. Her experience over the last twenty eight years led to the publication of her book "Transforming Wall Street: A Conscious Path for a New Future", which promotes the concept of conscious capitalism. A born and bred New Yorker, Kim moved to Hawai'i full-time in 2016.

THE WALL STREET COACH

# THE TRADER POSITIONING INDEX

## TESTIMONIALS

"Kim dug deep and delivered her hour-long assessment, my jaw almost hit the table because it felt as if Kim lived inside my head and fully understood my value system, thought process, and behavioral tendencies. And with that, Kim offered great and pragmatic insights into how I can do even better. I highly recommend Kim as she will surely bring out the best in everyone whom she counsels."

-Thaun Q. Pham, Former CTO of Uber

"Kim is not only an incredible coach but an amazing person. I met Kim initially through her free live coaching sessions which turned into doing the trader assessment and 2 coaching sessions. The trader assessment is a MUST do for anyone who is curious about what is really going on "under the hood". And if you are trading as a professional , it is a MUST do. I cannot thank Kim enough for the 100% attention that she gives on live coaching sessions and in person coaching."

- Carson Klahm, Trader

"After reaching out to Kim Ann Curtin and her team I began to invest in myself. I started with the Trader EQ sessions and then took the Trader Positioning Index evaluation which showed exactly where my issues were stemming from. Through continued investment in myself, I was able to rebuild my confidence and in just 6 months of this year, I have been able to grow my account by over 135%. Far exceeding my prior losses, gains, and expectations. Kim and her team are true professionals and the benefits that come from working with them go far beyond earnings and careers. If you let it, it can truly change your course in life."

-Tom Burnett, Trader

"Working with the [Trader Positioning Index] showed me how I can minimize my weaknesses and double down on my strengths. For a trader, business owner, entrepreneur - anyone who needs to think concretely and act decisively - these are invaluable insights. I highly recommend you do this work for yourself, the results can be profound."

-Aaron Gentzler, Financial Publisher

"I recently took Kim up on taking the [Trader Positioning Index]. Having taken many personality profile tests before, I pretty much figured I knew everything. I wasn't prepared for the results of the [Trader Positioning Index]. Kim took me through the results and gave me real clarity on my biggest hang ups. It not only helped me feel at ease, it also helped me close some sales because I was able to let go of the obstacles. Now, everyday, I use the index as a quick guide to "why" I feel the way I do. What needs aren't being met, how does that connect with my dilemma, and what action do I need to take. A priceless new piece of machinery in my mental tool box. So simple to understand and take action from. I wish I had been exposed to this 5 years ago."

-Barry Randall, CEO of the LSC Investment Group UK

"We were averaging a 62% turnover rate every six months before using the [Executive Positioning Index] as an interview tool. Since implementing it in our interview process we have seen our six month turnover rate drop to an average of 26%. The [Executive Positioning Index] gave us some positive measurable results. It also will continue to add more value in the future as we utilize more [Executive Positioning Index] data into our workforce development."

-Clay Kubicek, Education Director of Crossland Construction

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To learn more or experience The Trader Positioning Index with The Wall Street Coach team email  
Kim@thewallstreetcoach.com or call 646-420-2099