

# GUIDE CLIENTS TO FINANCIAL SUCCESS

# BUILDING WEALTH



## WHAT LEADS TO FINANCIAL SUCCESS?

### MONEY MINDSET.

Your work can help clients achieve financial success and live the life they want. The trouble is, client money mindset can take them far off the path towards financial success.

At DataPoints, we understand that achieving financial success requires not only financial plans but also the right mindset and habits to transform income into wealth.

Using 40+ years of data and insights based on *The Millionaire Next Door*, the Building Wealth assessment gives advisors the insights needed to help clients avoid behavioral pitfalls and achieve financial success.

## 40+ YEARS OF INSIGHTS THAT ARE EASY TO IMPLEMENT

Using insights from *The Millionaire Next Door* and our proprietary framework, easily add the power of behavioral assessments to your practice.

### 1. INVITE CLIENTS

Invite clients to complete the Building Wealth test. Invite them from the dashboard or create an automated process through an integration or with our embedded buttons.

### 2. REVIEW INSIGHTS

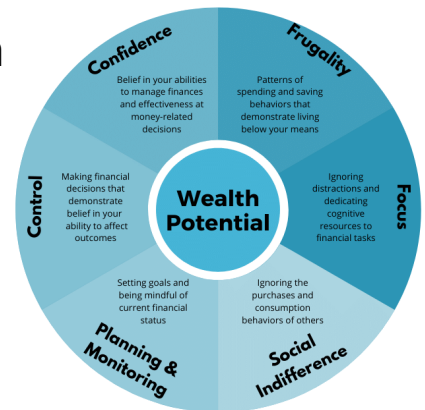
Review the detailed insights on six different wealth-building factors. Identify money-related strengths. Pinpoint potential behavioral pitfalls.

### 3. GUIDE CLIENTS TO SUCCESS

Use the framework to create meaningful conversations around money topics. Share personalized recommendations for enhancing wealth-building and wealth-sustaining habits. Track progress over time.

## Building Wealth Framework

Six factors that scientifically relate to net worth, no matter the client's age or income level.



## The Details

- Designed with the client in mind
- Client- and advisor-facing detailed reports
- Follow up questions for each factor
- Measures overall potential for building wealth
- Designed for clients new to building wealth
- Approximately 50 questions
- Takes 8-10 minutes to respond

Try it free for two weeks: [datapoints.com/start](https://datapoints.com/start)