

Building Wealth Assessment

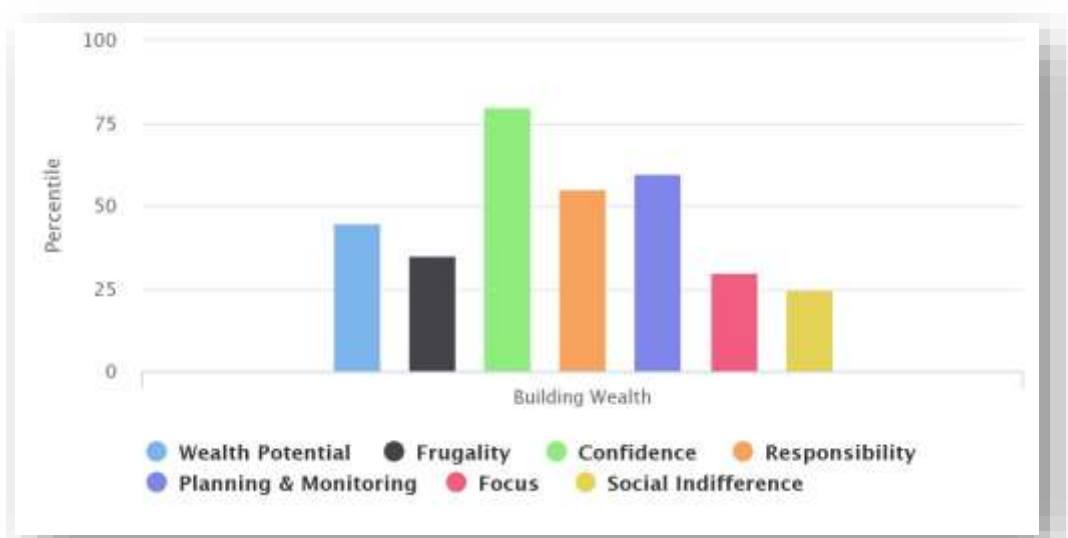
Measuring Behaviors That Build Wealth

Our research shows that small behaviors can impact financial success over time. How can you know if you're on the right track to building and/or maintaining wealth long-term?

As part of the financial planning and advisement process, your financial advisor is using a behavioral assessment to help you understand your patterns of financial behaviors. Building Wealth is an assessment created by DataPoints, using data from 40 years of research on self-made, affluent Americans from Thomas J. Stanley, author of *The Millionaire Next Door* and *The Millionaire Mind*. The assessment measures six wealth factors, or patterns of behaviors, that have been shown to relate to future financial success. It also provides an overall score, called Wealth Potential, that can help you understand how your overall combination of behaviors is impacting your financial success.

To get started, you'll receive an invitation to complete the short (10-15-minute) assessment. Covered topics include experiences with saving and spending; behaviors related to budgeting and planning; and demographic questions related to savings, income, and other personal characteristics. Your results will only be shared with your advisor.

After you complete the assessment, you'll receive a personalized report explaining how your behaviors relate to different aspects of wealth building. The report will give you information about each of the factors measured by the assessment.



The Building Wealth assessment helps you understand how your financial behaviors today might be impacting your financial success tomorrow.

Why Learn About Your Financial Behaviors?

Understanding wealth behaviors and working to improve or maintain critical behaviors is an integral part of ensuring financial success. Research has demonstrated that there is a relationship between certain behaviors and financial success over time. By assessing your wealth behaviors, you and your advisor can work together to improve and maintain those behaviors that will ensure a greater chance of financial success in the future. Use the Building Wealth report to:

- Learn about how your experiences and behaviors impact your current path to financial success
- Compare yourself to others: understand how your behaviors and experiences in certain wealth factors compare to the wider population
- Create a personalized action plan to help you enhance or maintain effective financial behaviors

Questions? Please contact your advisor or email DataPoints at research@datapoints.com.