Financial Perspectives Assessment

Understanding Your Financial Attitudes & Outlook

How do you feel about budgeting? What's the first thing that comes to mind when you hear "financial independence?" Do you view spending money as something that is entertaining, or is it a chore?

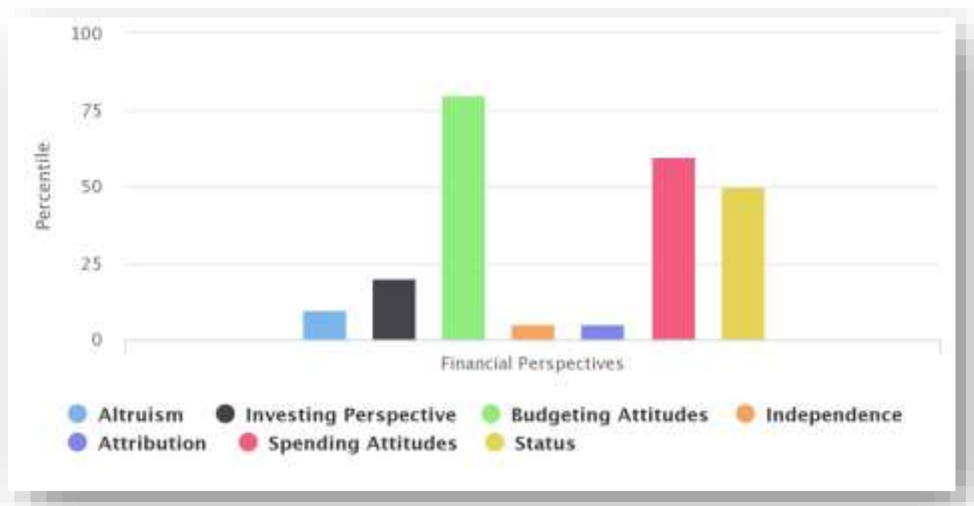
How you feel about financial topics and concepts can have an impact on your financial decision-making and behaviors and ultimately on your financial success. Likewise, our attitudes about money and finances can influence the way that we perceive advice about financial management. As part of working with your financial advisor, you'll be asked to complete the Financial Perspectives assessment from DataPoints, an assessment of seven different money-related attitudes, perspectives, and outlook.

To get started, you'll receive an invitation to complete the short, 10-15-minute assessment. The assessment consists of a series of statements, and you will be asked to rate your level of agreement with each statement. Read each statement carefully and respond with your level of agreement. The assessment covers topics such as budgeting, investing, shopping experiences, charitable giving, managing household finances, and other related areas. The assessment also includes demographic questions related to savings, income, and other characteristics. Your results will only be shared with you and your advisor.

After you complete the assessment, you'll receive a customized report that will provide you with your score on each of the seven factors, as well as interpretative text to help you understand each factor and what your score means relative to others who have taken the assessment.

The "Why" of Financial Perspectives

Everyone comes to the financial planning process with their own perspectives and attitudes about money. When working with a financial advisor, it's important for the advisor to understand your perspective regarding money-related topics. Your unique perspectives will help shape the way your advisor works with you in each of the areas listed. For example, your view of the concept of "budgeting" and its impact on achieving your financial goals is relevant to how your advisor will advise you on spending.



The Financial Perspectives assessment will help you and your advisor understand your perspectives and attitudes related to seven different areas of financial management.

The Financial Perspectives report provides a description of each of the wealth factors measured by the test, as well as personalized interpretation and tips. Use these insights to better understand how your unique attitudes might be helping or hindering how you achieve your financial goals.

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