

Building Wealth Assessment



DataPoints Measures Wealth Potential

How do clients build their wealth over time? Can you help clients to maximize their wealth building behaviors to maintain and optimize their wealth building potential?

DataPoints has scientifically identified individual factors that drive wealth, providing an unprecedented view into wealth-building potential. DataPoints' approach is unique: taking life experiences and behavioral factors uncovered through nearly 40 years of research on the wealthy that fueled *The Millionaire Next Door* and *The Millionaire Mind*, and adding assessment and predictive analytics to identify true wealth-building potential and actionable insights for advisors and clients to build or maintain wealth over time.

Assess Client Wealth Factors

Begin your client relationships with a deep understanding of behavioral patterns that impact financial success, and begin to demonstrate how working with an advisor can impact those behaviors for the better. Building Wealth measures four distinct wealth factors, scientifically developed measures of financial behaviors and experiences that relate to net worth. Clients respond to questions about savings, investing, spending, as well as other behavioral questions that can impact their financial success.

Confidence Demonstration of confidence in financial management, investing, and household leadership.

Frugality Financial behaviors associated with consistent saving, dedicated commitment to lower spending, and rigorous adherence to a budget.

Social Indifference Spending and saving behaviors that reflect immunity to social pressure to purchase the latest in consumer and/or luxury goods, clothing, & cars.

Responsibility Acceptance of the role of actions, abilities, and experiences in financial outcomes. Belief that luck plays a small part in achievement.

Add Behavioral Science to Your Practice

Ready to assess and coach clients and heirs to financial success? With DataPoints, you can easily add the power of behavioral assessment to your practice.

Contact us at sales@datapoints.com to get started.



Building Wealth measures four wealth factors, in addition to financial satisfaction.