Building Wealth Assessment

DataPoints Measures Wealth Potential

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

DataPoints has scientifically identified individual factors which drive wealth, providing an unprecedented view into wealth building potential for both you and your client.

Our solution combines life experiences and behavioral factors uncovered through nearly 40 years of research on the wealthy, which fueled *The Millionaire Next Door* and *The Millionaire Mind*, with assessment and predictive analytics. This approach is cutting edge for financial professionals who must meet the continued demands to be more than investment managers in the changing landscape of the industry.

Assess Client Wealth Factors

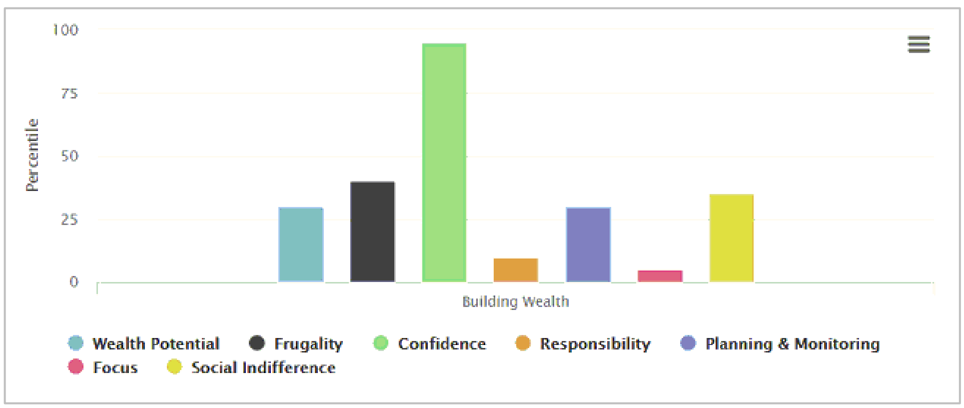
Using the Building Wealth assessment provides unique client experience that allows deeper understanding of the behavior patterns that impact money-related outcomes. Clients respond to questions about savings, investing, spending, as well as other areas that can impact their financial success.

The personalized reporting helps demonstrate how working with an advisor can impact those behaviors for the better. It also greatly deepens the relationship with existing clients and measures six wealth factors that relate to net worth:

Confidence Confidence in financial management, investing and household leadership

Focus Dedication to completing tasks and ignoring distractions

Frugality Behaviors associated with consistent saving, commitment to lower spending, and adherence to a budget



Building Wealth measures patterns of behaviors that can impact financial success.

Planning Planning, organizing and monitoring of investments and financial matters

Social Indifference Immunity to social pressure to purchase the latest in consumer and/or luxury trends

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

Be More

Ready to assess and coach clients to financial success? With DataPoints, you can easily add the power of behavioral assessment to your practice, going beyond investment advice and shaping a holistic, life-long approach to wealth for your clients and their families. Contact us at sales@datapoints.com to get started.