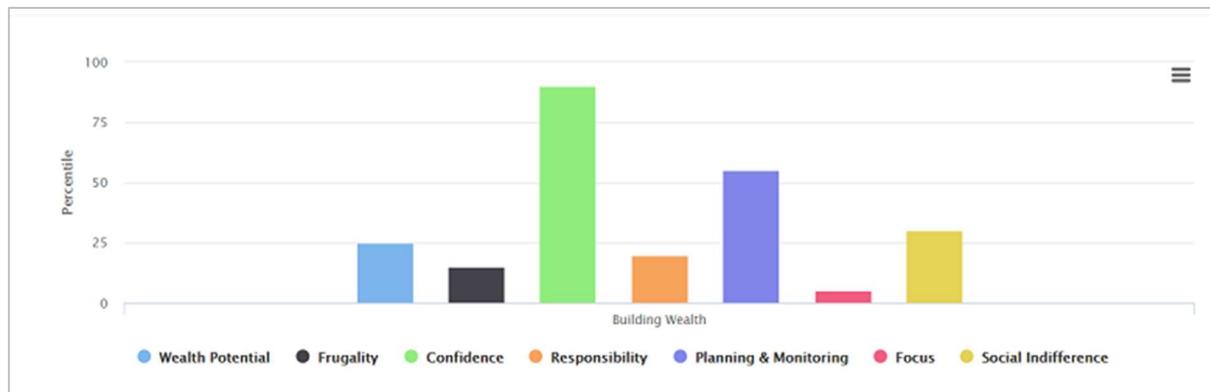


Patterns of Wealth Behaviors



Understanding How Behaviors Impact Financial Success

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 test measures six wealth factors, or patterns of behaviors, that have been shown to relate to future financial success.



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

To get started, you will receive an invitation to complete the short, 15-minute assessment. Some questions will ask you about experiences with saving and spending, behaviors related to budgeting and planning, as well as 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 will receive a personalized report explaining how your behaviors and experiences relate to different aspects of building wealth. Our research shows that patterns of financial behavior have tremendous impact on your wealth building potential, and this report will give you guidance on how to maintain or change your behaviors to enhance your overall propensity to build wealth.

Why Learn About Your Financial Behaviors and Experiences?

Understanding wealth behaviors and working to improve or maintain 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 work together to improve and maintain those behaviors that will lead to financial success in the future.

The Building Wealth report provides a description of each of the wealth factors measured by the test, as well as personalized interpretation and tips. You can use these insights to:

- Learn about how your experiences and behaviors impact your current path to financial success;
- Gain an understanding of your strengths and challenge areas related to financial behaviors; and
- Explore ways to improve and/or maintain your own patterns of wealth behaviors.

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