

<b>The 21-Point Wealth Assessment</b>	<b>Your Score</b> <b>1 = Not Sure</b> <b>10 = Fully Sure</b>
1. Is your Retirement Lifestyle Plan WRITTEN, FULLY INTEGRATED AND UPDATED to include income tax reduction, lifestyle and cash flow enrichment, investment enhancement, risk defense, health care protection, and legacy creation?	
2. Are you in FULL CONTROL of your money and future so you are enjoying more peace of mind, confidence and a freedom in retirement??	
3. How TAX-RATE SENSITIVE is your present Retirement Lifestyle Income and have you taken full advantage of every opportunity to shield your retirement income from FUTURE TAX INCREASES?	
4. Does your Retirement Lifestyle Income Plan include the IDEAL COMBINATION of predictable income and income designed to increase with the cost of living?	
5. Created multiple sources of predictable retirement income you can't outlive with a portion guaranteed against market losses?	
6. Do you have a BUCKET LIST LIFESTYLE strategy that enhances your retirement income and upgrades your lifestyle while you have the time and health to do all the things you have dreamed of?	
7. Analyzed your Retirement Investment Engine to uncover COSTLY LEAKS due to 5 Invisible Forces of Investment Friction?	
8. Are your investments LOST DECADE & STOCK MARKET CRASH "stress-tested?"	
9. Do you know how much YOU WILL LOSE in the next Stock Market Crash (1960, 1969, 1973, 1980, 1991, 2001, 2008, 2020...?) ... and are you OK losing that much?	
10. Have you made certain that you are NOT UNDERPAID for all the investment RISK you are taking with your investments?	
11. Is your Retirement Lifestyle Income Plan designed to SECURE YOUR LIFESTYLE during stock market corrections AND crashes?	
12. Fully protected your retirement income and savings against future INFLATION AND COST OF LIVING increases?	
13. Reduced or outsourced the risk and impact of EXCESSIVE long-term care costs that will impact 7 in 10 (70%) retirees?	
14. Have you taken FULL advantage every NEW and existing tax-saving option created under the latest tax legislation and 72,000 pages of IRS tax code?	
15. Are you taking FULL advantage of the 3 VARIETIES OF MONEY to protect your money from FUTURE TAX INCREASES?	
16. Have you reduced or eliminated the little known "RETIREMENT DEATH TAX" on your 401(k) and IRAs?	
17. How protected are yourself, your investments, home and other assets from FRIVOLOUS lawsuits and litigation?	
18. DISINHERITED THE IRS by sending unnecessary death taxes to family and charity?	
19. Designed your legacy for your children and grandchildren to be immune from the FOUR WEALTH PREDATORS?	
20. Designed a positive, conflict-free, INCENTIVE-BASED LEGACY to for your children and grandchildren?	
21. Designed a written lifestyle and legacy roadmap with a ON TRACK SUCCESS SYSTEM to ensure you stay on track without having to worry?	
<b>Your Wealth Score</b>	

**Your Secured Wealth Score**

- 180 – 210 You can put the scorecard down and go enjoy a fantastic retirement.
- 120 – 180 You still can take advantage of more opportunities. Get a Wealth Stress Test.
- Below 120 You are missing major opportunities. Take action soon

## **You've Got Your Score, So Now What?**

*If you scored below a 120 than you can benefit from a Wealth Stress Test.*

Schedule Your Free 23-minute Opportunity Conversation

<https://calendly.com/floriowmg/opportunity-conversation>

Or give us a call at: (516) 758-2430

During your conversation with a member of our team, you will uncover the biggest obstacles that are keeping you from living the ideal lifestyle that you've worked so hard to achieve. You'll also identify the biggest opportunities to put you on the path to an abundant retirement. You will know exactly what to do next, if anything, to have the peace of mind and freedom that we believe you deserve.

You're 23-minute Opportunity Conversation is just a click or a call away. Take the most important step – the next one.

Just want to ask us a follow up question? Email us at: [RetireSmart@floriowmg.com](mailto:RetireSmart@floriowmg.com)

