


# THE FINANCIAL FREEDOM SCORECARD®

## Are You Doing As Well As You Could Be?

Take 90 Seconds And Find Out!

Key Components	Evaluating Your Plan For Financial Freedom	Rate Your Current Planning 1 (Least) – 5 (Best)		What Does Your Score Mean?
1 Protection Components	My family and I are fully protected from life's uncertainties through current wills, life, disability and liability insurances.			<p><b>GREATER THAN 27</b> Congratulations! You've successfully addressed the key components of having a solid financial plan. Continue to review everything annually.</p> <p><b>20 – 27</b> You're most likely on your way to having the key areas of planning under control. Focus on the areas you scored lowest. Getting a second opinion should provide insight and enhance what you've already done.</p> <p><b>15-20</b> It's definitely time to address these key areas before too much time passes and some options may no longer exist. A holistic and thorough approach is clearly needed to help you build and protect your future.</p> <p><b>Less than 15</b> It's imperative to get a detailed comprehensive plan in motion to address all of these glaring weaknesses in your current planning. Do not put this off any longer as the real cost of inaction could be devastating.</p> <p><b>All Progress Begins With A Conversation.</b></p> <p><a href="mailto:info@hdci.biz">info@hdci.biz</a> 516.677.6208 - <a href="http://www.hdci.biz">www.hdci.biz</a></p>  <p><b>HOCHHEISER, DEUTSCH</b> &amp; Company Inc <i>Helping to Secure Your Lifestyle and Your Legacy</i></p>
2 Personal Savings Rates	We are regularly saving 15-20% of our gross income and we are on track for all our short and long term financial goals.			
3 Performance & Diversification	Our investments have performed very well over the years and we have a thorough diversification of strategies. We also have a diversified approach to how our assets will be taxed in retirement.			
4 Confidence & Understanding	We fully understand our wealth building, and our wealth protection strategies. We are confident in all aspects of our financial plan.			
5 Financial Freedom	We are confident we will have the financial resources to do whatever we want, whenever we want in retirement.			
6 Professional Creativity & Leadership	We work with a professional who is extremely pro-active with all aspects of our financial plan. They are totally vested in the success of my whole family.			
Names: _____ Date: _____		Total Score _____		Initials _____

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