

The 17 Point Wealth Assessment

Have You...	Your Plan Now	Score YES = +10 NO = -10
1. Fully minimized the amount you are paying in income and capital gains taxes?	<input type="checkbox"/> No <input type="checkbox"/> Yes	
2. Taken full control of your money so that you are enjoying more peace of mind and a freedom lifestyle in retirement?	<input type="checkbox"/> No <input type="checkbox"/> Yes	
3. Reduced or eliminated the little known "retirement death tax" on your IRA and 401(k)?	<input type="checkbox"/> No <input type="checkbox"/> Yes	
4. Fully insulated your hard-earned savings against the next 1960, 1969, 1973, 1980, 1991, 2001, 2008...?	<input type="checkbox"/> No <input type="checkbox"/> Yes	
5. Created multiple sources of predictable retirement income you can't outlive with a portion guaranteed against market losses?	<input type="checkbox"/> No <input type="checkbox"/> Yes	
6. Calculated the probability that your savings will allow you to live your desired lifestyle for as long as you live?	<input type="checkbox"/> No <input type="checkbox"/> Yes	
7. Taken advantage of every income tax savings opportunity outlined in the 72,000 pages of IRS tax code?	<input type="checkbox"/> No <input type="checkbox"/> Yes	
8. Stress-tested your investments to uncover costly leaks due to undetected money friction?	<input type="checkbox"/> No <input type="checkbox"/> Yes	
9. Made certain that you are getting paid appropriately for all the investment risk you are taking with your money?	<input type="checkbox"/> No <input type="checkbox"/> Yes	
10. Fully protected your savings and income against future inflation and health care cost of living increases?	<input type="checkbox"/> No <input type="checkbox"/> Yes	
11. Shielded your retirement dollars against frivolous lawsuits that target people with money?	<input type="checkbox"/> No <input type="checkbox"/> Yes	
12. Fully funded your future health care costs to the tune of over \$247,000?	<input type="checkbox"/> No <input type="checkbox"/> Yes	
13. Reduced your exposure to all known and unknown economic and financial risks?	<input type="checkbox"/> No <input type="checkbox"/> Yes	
14. Designed your legacy for your children and grandchildren to be immune from the Four Wealth Predators?	<input type="checkbox"/> No <input type="checkbox"/> Yes	
15. Received a second opinion on your present plan to uncover any unknown flaws or missed opportunities?	<input type="checkbox"/> No <input type="checkbox"/> Yes	
	Total Points	

For Every "YES" add 10 Points. For Every "NO" Subtract 10 Points.

- 130 – 150 You can put the scorecard down and go enjoy a fantastic retirement.
- 100 – 130 You still can take advantage of more opportunities. Get a second opinion.
- 70 – 100 You are missing major opportunities. Take action soon.

Bonus Points

16. Disinherited the IRS by sending any taxes to family and charity?	<input type="checkbox"/> No <input type="checkbox"/> Yes	*
17. Designed a positive, conflict-free, incentive-based legacy to for your children and grandchildren?	<input type="checkbox"/> No <input type="checkbox"/> Yes	*