

## ***THE LIFESTYLE ASSURANCE PROCESS SCORECARD™***

To help you clearly understand your current situation, try the *Lifestyle Assurance Process Scorecard™*. Rate your reaction to each pair of phrases. Decide where you lie on a scale from 1 to 5, circle your corresponding number and add your total at the bottom of each column.  
***Please fax the completed page back to our office at (914) 251-0344, Attn.: Vanessa Nardella.***

**NAME:** \_\_\_\_\_ **PHONE:** \_\_\_\_\_ **EMAIL:** \_\_\_\_\_  
**ADDRESS:** \_\_\_\_\_

We do not have a clear vision of our future	1	2	3	4	5	We have a clear, well defined vision our future
We do not have clear financial goals	1	2	3	4	5	We have clear financial goals
We do not have a financial strategy to create a more wealth from the money we earn	1	2	3	4	5	We have a financial strategy to create more wealth from the money we earn
We do not have a step-by-step action plan to improve our lifestyle and protect our family	1	2	3	4	5	We have a step-by-step action plan to improve our lifestyle and protect our family
Our financial plan is inefficient and our financial products do not fit together	1	2	3	4	5	We have an efficient financial plan and products fit together with our goals
We are not aware of all the opportunities available and what products will work for us	1	2	3	4	5	We are taking advantage of all our opportunities and the products that will work best for us
We are not aware of all our dangers and have not taken steps to protect ourselves	1	2	3	4	5	We are aware of all our dangers and have taken steps to protect ourselves
We do not have an effective way to measure our progress	1	2	3	4	5	We have developed an effective system to measure our progress
We worry that we will not have enough money to protect our lifestyle and family	1	2	3	4	5	We have a financial strategy to ensure that we can protect our lifestyle and family
We do not have as much confidence in the future as we would like	1	2	3	4	5	We have a strong sense of confidence about our future
<b>ADD COLUMN TOTALS</b>						<b>YOUR SCORE</b>

**ARE YOU INTERESTED IN LEARNING MORE ABOUT OUR PROCESS? \_\_\_ YES \_\_\_ NO**

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