

Wealth Index™ Analyzer

Summary of your Chits*

Personal Investments

Money Market Accounts	\$ _____
CD's	\$ _____
Stocks	\$ _____
Bonds	\$ _____
Mutual Funds	\$ _____
Investment Real Estate (Equity)	\$ _____
Other	\$ _____

Retirement Plan Investments

IRA's	\$ _____
SEP's	\$ _____
401-k's	\$ _____
Other	\$ _____

Total Chits \$ _____

Calculate your Wealth Index™

$$\begin{aligned} & \$ \quad \text{Total Chits} \\ & \div \text{_____ Estimated Annual Living Expenses} \times 20 \\ & \times \text{_____ } \mathbf{100} \text{ Wealth Index factor} \\ & \quad \mathbf{\text{Your Wealth Index}^\text{TM}} \end{aligned}$$

Wealth Index™ Scale

- < 100 **You must *continue to work and invest.***
- 100 **You are *financially independent.***
- 200 **You are considered *Wealthy!***
- > 500 **You are considered *Rich!***

*A **Chit** is any asset that can produce cash flow for you either now or in the future.

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