

THE FINANCIAL CLARITY ADVANTAGE SCORE

What is Financial Clarity? It is knowing where you are, where you want to go and how you are going to get there. To determine if you have Financial Clarity, you must ask yourself critical questions about all aspects of your financial position. **Clarity creates confidence.**

Determine your Financial Clarity Score:

Rank yourself on a scale of 1 to 10 with 1 being 'no clarity' and 10 being 'perfectly clear'.

1. Your financial goals are clearly defined and you are making progress toward them ☐
2. You are confident in your financial knowledge and ability to make long-term financial decisions ☐
3. You know how much income you need to maintain your current lifestyle now and in the future ☐
4. You are saving enough to accomplish your financial goals ☐
5. You are maximizing your employee benefits package (insurances, savings plans & pensions) ☐
6. Your accounts are properly invested based on your objectives and risk tolerance ☐
7. You have sufficient insurance to provide for your loved ones ☐
8. You are minimizing your taxes, to the extent possible ☐
9. You have a plan for future health care costs ☐
10. You have provided sufficient instruction to pass your estate to whom you want, when you want ☐

Your Financial Clarity Score:

Out of 100

Assessment of your Financial Clarity Score

Scores from 10 to 49: Take this opportunity to define your financial priorities, get organized and seek guidance to educate yourself on the key aspects of your financial plan.

Scores from 50 to 75: You are on your way to Financial Clarity. Consider addressing the specific areas that you identified as lacking clarity with an advisor from NorthLanding Financial Partners.

Scores from 76 to 100: Congratulations! You have taken a holistic approach to financial planning. Ensure that you stay on track with an advisor from NorthLanding Financial Partners.

For help with your Financial Clarity, contact us at: (585) 497-5000

Your Partner for Financial Clarity.

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