

Assessing and Triaging Your Financial Health



Building your ideal future requires you to maintain financial health. Likewise, to assure your physical health is optimal, it is wise to get an annual physical from your family doctor. The physician asks you questions, listens to your heart, takes your blood pressure, orders tests, and follows standard medical procedures to ensure you are in good health. If anything is off track, they provide a treatment plan, write a prescription, or refer you to a specialist. Worst case, they rush you to the emergency room!

Similarly, Savant's Ideal Futures Financial Health AssessmentSM, a part of The Building Ideal Futures ProcessSM, is a thoughtfully prepared and proprietary online assessment that provides us with an objective review of your current financial state. It helps us prioritize what aspects of your financial situation need attention so we can formulate and propose optimal planning strategies.

This assessment helps us determine if you are using appropriate financial strategies and tools, helps eliminate needless risk, and helps capitalize on certain opportunities that closely align your assets and decisions with your goals.

Of course, an annual physical does not cure all your ills, but it does provide a framework and discipline to either confirm you are healthy or, alternatively, identify areas that need addressing.

Similarly, a financial health assessment does not cure all your ills, but it does help accomplish three things. For each of the ten key areas of planning, it asks: 1) have you leveraged core planning strategies, and if so, 2) how long has it been since you updated this planning, and 3) are you confident that you have done everything necessary to address your financial and life needs in each of the ten key areas.

The overall assessment provides a total score between 0 and 100 that gives you a high level estimate of your overall financial health. In addition to providing you with an overall score, the Ideal Futures Financial Health AssessmentSM also provides you with sub-scores on each of the ten key financial planning areas. Your advisor can then recommend ways to help improve your financial health in areas that need improvement.

We encourage you to spend 10-12 minutes taking Savant's proprietary online financial health assessment. Alternatively, your advisor can use it to assess your situation the next time you meet.

READY FOR YOUR FINANCIAL "CHECK UP"?
 Go to bit.ly/savantFHA, email financialhealth@savantcapital.com, or contact your financial advisor for online access to the tool. Click the link and just follow the prompts! Don't hesitate to contact us to discuss your results.

Hypothetical Assessment Results Ideal Futures Financial Health ReportSM



Assessment Scoring Ranges

10 Key Areas Assessment	
0 - 5	Needs attention now
6 - 7	Needs attention during next 12 months
8 - 10	No immediate concerns

Overall Assessment	
0 - 60	Needs attention now
61 - 80	Needs attention during next 12 months
81 - 100	No immediate concerns

This assessment is not a stand-alone document but is intended as a starting point for discussion with your financial, tax and legal advisor(s) regarding planning strategies to consider. Based on your discussions, you and your advisor may choose to implement those strategies that make the most sense for your situation. Hypothetical assessment results are for illustrative purposes only.

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