

Get Rich On Purpose®

Putting You On Your Path to Financial Freedom

Wealth Index Analyzer

Personal Investments

Money market accounts	\$ _____
CD's	\$ _____
Stocks	\$ _____
Bonds	\$ _____
Mutual funds	\$ _____
Investment real estate (equity)	\$ _____
Other	\$ _____

Retirement Plan Investment

IRAs	\$ _____
SEPs	\$ _____
401(k)s	\$ _____
Other (Roth IRA)	\$ _____
Total Investment Net Worth	\$ _____

Calculate your Wealth Index

$$\begin{array}{r} \$ \underline{\hspace{2cm}} \text{ Total Investment Net Worth} \\ / \quad \$ \underline{\hspace{2cm}} \text{ Target Portfolio Goal} \\ = \quad \$ \underline{\hspace{2cm}} \\ \mathbf{X} \quad \mathbf{100} \quad \mathbf{Wealth Index Factor} \\ = \quad \underline{\hspace{2cm}} \mathbf{Your Wealth Index} \end{array}$$
