

FORTUNE BUILDER

Changing the Way America Saves Money and Builds Wealth

Our Portfolio Assessment Tool will help you identify:

- How well protected your money is from the 3 Wealth Killers
- How completely it benefits from the 5 Money Needs
- Whether adjustments are necessary
- Whether to make corrections that better serve your aspirations

The 3 Wealth Killers	What % of my money is safe from:	What % of my money do I want to be safe from:	PRIORITY 1 = HIGH 10 = LOW
1. Market Risk The possibility of loss			
2. Fees & Commissions Exposure to total portfolio costs greater than 1%			
3. Taxes Exposure to current or future income or capital gains taxation			

The 5 Money Needs	What % of my money benefits from:	What % of my money do I want to benefit from:	PRIORITY 1 = HIGH 10 = LOW
1. Safety Immune from market risk due to market loss			
2. Growth Certainty of year-to-year, locked-in growth potential			
3. Income Certainty of permanent and maximum income in retirement			
4. Liquidity Ability to access money when you want without tax penalty			
5. Tax - Efficiency Protection from taxation at future, unknown tax rules			

After completing this assessment, you will be able to determine if your portfolio is in alignment with the aspirations you have for your money, retirement, and family legacy.

If your current strategy does not eliminate the **3 Wealth Killers** and deliver the **5 Money Needs**, we encourage you to ask a **Fortune Builder Wealth Advisor** to show how you how our plan might work for you.