

Wealth Identity TEST



THE POWERFUL WEALTH BUILDERS

Building Wealth, One Home At A Time

Wealth Identity Test™

Instructions: Read each question carefully and select the ONE answer that best reflects your natural thinking and behavior.

1. When you receive unexpected money, what do you usually do first?

- A. Pay bills or immediate needs
- B. Spend on lifestyle or enjoyment
- C. Invest for growth
- D. Save and invest for the future

2. How do you usually handle your monthly income?

- A. Pay bills or immediate needs
- B. Spend on lifestyle or enjoyment
- C. Invest for growth
- D. Save and invest for the future

3. What best describes your attitude toward saving?

- A. Pay bills or immediate needs
- B. Spend on lifestyle or enjoyment
- C. Invest for growth
- D. Save and invest for the future

4. How do you approach investing?

- A. Pay bills or immediate needs
- B. Spend on lifestyle or enjoyment
- C. Invest for growth
- D. Save and invest for the future

5. When thinking about money, you mostly think about...

- A. Pay bills or immediate needs
- B. Spend on lifestyle or enjoyment
- C. Invest for growth
- D. Save and invest for the future

6. What is your main financial goal right now?

- A. Pay bills or immediate needs
- B. Spend on lifestyle or enjoyment
- C. Invest for growth
- D. Save and invest for the future

7. How do you view debt?

- A. Pay bills or immediate needs
- B. Spend on lifestyle or enjoyment
- C. Invest for growth
- D. Save and invest for the future

8. When you get a raise, you usually...

- A. Pay bills or immediate needs
- B. Spend on lifestyle or enjoyment
- C. Invest for growth
- D. Save and invest for the future

9. How often do you review your finances?

- A. Pay bills or immediate needs

___ B. Spend on lifestyle or enjoyment

___ C. Invest for growth

___ D. Save and invest for the future

10. What do you prioritize when spending money?

___ A. Pay bills or immediate needs

___ B. Spend on lifestyle or enjoyment

___ C. Invest for growth

___ D. Save and invest for the future

11. How do you feel about owning assets like real estate or businesses?

___ A. Pay bills or immediate needs

___ B. Spend on lifestyle or enjoyment

___ C. Invest for growth

___ D. Save and invest for the future

12. When planning for the future, you focus on...

___ A. Pay bills or immediate needs

- B. Spend on lifestyle or enjoyment
- C. Invest for growth
- D. Save and invest for the future

13. What best describes your financial education habits?

- A. Pay bills or immediate needs
- B. Spend on lifestyle or enjoyment
- C. Invest for growth
- D. Save and invest for the future

14. How do you handle financial setbacks?

- A. Pay bills or immediate needs
- B. Spend on lifestyle or enjoyment
- C. Invest for growth
- D. Save and invest for the future

15. When you think about retirement, you think about...

- A. Pay bills or immediate needs
- B. Spend on lifestyle or enjoyment

___ C. Invest for growth

___ D. Save and invest for the future

16. What role does budgeting play in your life?

___ A. Pay bills or immediate needs

___ B. Spend on lifestyle or enjoyment

___ C. Invest for growth

___ D. Save and invest for the future

17. How do you decide what to buy?

___ A. Pay bills or immediate needs

___ B. Spend on lifestyle or enjoyment

___ C. Invest for growth

___ D. Save and invest for the future

18. How do you feel about delayed gratification?

___ A. Pay bills or immediate needs

___ B. Spend on lifestyle or enjoyment

___ C. Invest for growth

___ D. Save and invest for the future

19. When you talk about money, you usually talk about...

___ A. Pay bills or immediate needs

___ B. Spend on lifestyle or enjoyment

___ C. Invest for growth

___ D. Save and invest for the future

20. What best describes your long-term financial vision?

___ A. Pay bills or immediate needs

___ B. Spend on lifestyle or enjoyment

___ C. Invest for growth

___ D. Save and invest for the future

Total the number answers for each letter and write them on the below lines:

A. _____ B. _____ C. _____ D. _____

Full Name:

Email Address:

Cell Phone#:

Date: