

MEASURING up to your potential

Ever wonder what separates the folks who are financially comfortable from the rest of us? Sure there's money, but it turns out they're also doing some pretty simple things to set themselves up for success. Research* from Guardian highlights what you could be doing to join them.

WHAT SETS THEM APART

SONIA SMITH + JIM JOHNSON

CONFIDENCE

1.7 times more likely to feel confident day to day

SATISFACTION

1.5 times more likely to be very satisfied with their lives overall

ATTITUDE

3.9 times more likely to make every effort to be sure their financial expectations are realistic and achievable

AWARENESS

1.9 times more likely to own the right financial products to keep them comfortable

FOCUS

3.5 times more likely to consider themselves much more focused on the long term than short term

READINESS

5.8 times more likely to be confident that they're financially ready for retirement

WHAT THEY'RE DOING DIFFERENTLY

61%

TO DO LIST

Have a written financial plan

of those...



53%

Have clear financial goals



47%

List out a planning time horizon



46%

State investment strategies by comfort level



37%

Declare an expression of risk tolerance

WHAT YOU CAN DO TO JOIN THEM

Identify goals early and often



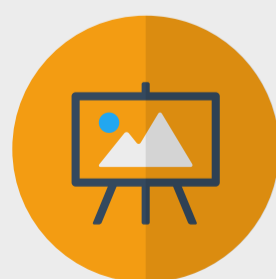
Assess your risk tolerance



Settle on a target timeline



Focus on your big picture



Prioritize your protection



Draft a financial plan

