YOUR MONEY MATCH

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YOUR COMFORT WITH RISK, TOGETHER

51 out of 100 **Moderate Growth**



Cautious Bold

Putting both of your answers together, the two of you land at Moderate Growth. These portfolios include stable fixed-income assets as well as more growth assets for diversification and potential gains.

This type of portfolio typically holds growth assets in the range of 52% to 65%.

Your risk results differ

How comfortable each of you feels with investment risk doesn't line up the same way with what you've actually done in the past, or with how you'd handle a big loss.

What your score means

- Your risk score shows how comfortable you are with the ups and downs of investing, from 5 (very cautious) to 95 (very bold). It is about comfort with risk, not skill.
- Your score together blends both of your answers.

AT A GLANCE

7
Places you match

9
Places you differ

You match on 7 of 16 areas. The places you differ are good conversation starters.

Your Money Match is a conversation starter based on your answers to the Money & Risk Inventory (MRI) surveys. It is educational, is not investment advice, and is not a recommendation to buy or sell anything. Results are not a prediction and can change over time.

Your Firm

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Where you match

You landed in the same place on these. A good foundation to build on.

NEITHER OF YOU STANDS OUT ON THESE

Money Avoidance / Guilt
Beliefs about money, such as feeling guilty about the money you have.

Money Status
The belief that self-worth is tied to financial status or net worth.

Work-Life Balance
The balance between work responsibilities and personal life.

Belief in Goals
A person's belief about how much they can influence life outcomes.

Financial Confidence
How much control a person feels they have over their financial outcomes.

Self-Efficacy
A person's belief in their ability to handle financial tasks and challenges.

Goals & Values
The principles and goals that guide a person's financial decisions.

Where you differ

The places your results are not the same. These are good conversation starters.

Herding
Making investment decisions based on what others are doing.

Your results are not the same here.

Worth talking about: When friends or headlines get loud about money, how do we stay on our own plan?

Money Focus
How much importance a person places on money in their life.

Your results are not the same here.

Worth talking about: When life feels hard, how do we keep spending from becoming the fix?

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Money Vigilance

A cautious and watchful approach to money, such as careful management and avoiding debt.

Your results are not the same here.

Worth talking about: How much watching and saving feels right to each of us, and when is it enough?

General FOMO

The fear of missing out because others seem to be having better experiences.

Your results are not the same here.

Worth talking about: Which experiences are truly worth it to us, no matter what anyone else is doing?

Financial FOMO

The fear of missing out on financial opportunities, which can lead to hasty decisions.

Your results are not the same here.

Worth talking about: What is our rule for a "can't miss" opportunity before we put money into it?

Financial Knowledge

How much experience and understanding a person has with investing.

Your results are not the same here.

Worth talking about: What would we each like to understand better about money and investing?

Overconfidence

How sure a person feels about their own investment decisions.

Your results are not the same here.

Worth talking about: How do we make sure big money decisions get a second look before we act?

Financial Engagement

How actively a person takes part in managing and understanding their finances.

Your results are not the same here.

Worth talking about: Who does what with our money today, and does that split feel right to both of us?

Financial Satisfaction

How content a person feels about their financial situation.

Your results are not the same here.

Worth talking about: What one change would make us both feel better about where we stand?

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Let's talk about it

A conversation with your advisor is the best next step.

PLACEHOLDER: ABOUT THE FIRM

[Firm language goes here: a short paragraph about your firm, how you work with couples, and what a first conversation looks like.]

PLACEHOLDER: CONTACT INFORMATION

[Advisor name and title]
[Phone] | [Email]
[Website] | [Address]
[Line to schedule a meeting]

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