

**KLR WEALTH MANAGEMENT, LLC**  
**The High-Net-Worth Personality Quiz**

To determine your high-net-worth personality, take the following self-diagnostic quiz. Simply prioritize from most important to least important the statements in each group. Be sure to write down the first thought that pops into your mind. Don't stop to think about

1. *Please rank each of the following between 1 and 4, with 4 being the most important to you and 1 the least.*

Funding college education for my children and grandchildren (A)  
 Achieving my asset-accumulation goal (G)  
 Having enough money to have the vacation home I want (F)  
 Getting enough money to retire early (C)

2. *Please rank each of the following between 1 and 4, with 4 being the most important to you and 1 the least.*

Having a fun time investing (H)  
 Learning about the most sophisticated investing methods (I)  
 Having enough money to have the power I want (E)  
 Being able to maintain my privacy (D)

3. *Please rank each of the following between 1 and 4, with 4 being the most important to you and 1 the least.*

Finding someone I trust to do my investments so I don't have to be involved (B)  
 Ensuring the security of my family through my investments (A)  
 Minimizing the risk of identity theft through proper disposal of financial information (D)  
 Having sufficient assets invested to be independent (C)

4. *Please rank each of the following between 1 and 4, with 4 being the most important to you and 1 the least.*

Being able to protect the confidentiality of my investments (D)  
 Having the assets to buy the things I want (F)  
 Being able to focus on the exciting aspects of investing (H)  
 Having the luxury of not educating myself on technical financial minutiae (B)



5. *Please rank each of the following between 1 and 4, with 4 being the most important to you and 1 the least.*

- Having sufficient assets to feel powerful (E)
- Using the most modern investment approaches (I)
- Using my investments to take care of my family (A)
- Concentrating on increasing the amount of my assets (G)

6. *Please rank each of the following between 1 and 4, with 4 being the most important to you and 1 the least.*

- Having the asset base to live wherever I want to (C)
- Having enough assets so that others respect me (F)
- Hiring a top money manager to oversee my account and forgetting all about it (B)
- Maintaining complete privacy over my investment affairs (G)

7. *Please rank each of the following between 1 and 4, with 4 being the most important to you and 1 the least.*

- Finding new ways to keep investing a thrilling part of my life (H)
- Applying the most technical investment approaches (I)
- Having the investment base to get people to do what I want (E)
- Using investment products to transfer assets to family members (A)

8. *Please rank each of the following between 1 and 4, with 4 being the most important to you and 1 the least.*

- Being able to avoid getting involved in the details of investing (B)
- Focusing on increasing my assets (G)
- Having the assets to enjoy the finer things in life (F)
- Ensuring my privacy with the investment managers I choose (D)

9. *Please rank each of the following between 1 and 4, with 4 being the most important to you and 1 the least.*

- Having advanced planning and products in my investment portfolio (I)
- Being able to use my investments to influence the way things are done (E)
- Having the confidence that I can live independently (C)
- Staying very involved on a day-to-day basis (H)

## High-Net-Worth Personality Quiz Scoring

Add up all your totals for A's, B's, C's etc. in the box below. E-mail the results to Paptaker@KLRWealth.com.

	<b>Total</b>
<b>A</b>	
<b>B</b>	
<b>C</b>	
<b>D</b>	
<b>E</b>	
<b>F</b>	
<b>G</b>	
<b>H</b>	
<b>I</b>	

*Source: Russ Alan Prince and Brett Van Bortel, *The Millionaire's Advisor*<sup>TM</sup>, 2003*