

Economics of Life Research Project

Affluent Individuals Planning Program Loss Test

Affluent individuals, who have \$1,000,000, or more, of surplus savings, exceeding their lifestyle costs through life expectancy, qualify for participation in the Affluent Individuals Planning Program component of the New Economic Order Planning Program. Special-design economic education, personalized capital distribution and endowment creation plans provide asset protection/guaranteed life income/wealth transfer planning, and risk elimination, gain consolidation, and guaranteed principle savings management planning programs generating 6% to 12% guaranteed life income.

1. Is your employer taxed as a “pass through” entity? Yes ___ No ___
2. Are you age 54 or under? Yes ___ No ___
3. Is your spouse age 54 or under? Yes ___ No ___
4. Do you have leveraged catastrophic loss protection against chronic or terminal illness and assisted living costs? Yes ___ No ___
5. Do you currently have a plan to accumulate tax-free life income equal to your lifestyle costs? Yes ___ No ___
6. Do you have \$1,000,000, or more, of surplus savings exceeding your lifestyle costs through your life expectancy? Yes ___ No ___
7. Do you currently have personal savings allocated to risk of principal stocks and/or mutual funds? Yes ___ No ___
8. Do you have \$100,000, or more, of personal savings allocated to risk of principal stocks or mutual funds? Yes ___ No ___
9. Do you currently have pension/401k plan/IRA savings allocated to risk of principal stocks and/or mutual funds? Yes ___ No ___
10. Do you have \$100,000, or more, of pension/401k plan/IRA savings allocated to risk of principal stocks or mutual funds? Yes ___ No ___
11. Do you wish to fund a perpetually multiplying family endowment? Yes ___ No ___
12. Do you wish to fund a perpetually multiplying endowment for a 501(c)(3) non-profit organization that supports values that are important to you, your family and/or society? Yes ___ No ___

5 or more “No” answers indicate that you are a candidate for the Affluent Individuals Planning Program. You have exposure to unnecessary losses of surplus savings, and lack of access to planning to create perpetually multiplying funding for family members and/or favored 501(c)(3) non-profit organizations.