

# Economics of Life Research Project

## Highly Productive Individuals Planning Program Loss Test

Productive individuals, who have \$30,000, or more, of annual surplus pre-tax earnings, exceeding their lifestyle costs, and/or \$250,000 of equity assets they control, qualify for participation in the Highly Productive Individuals Planning Program component of the New Economic Order Planning Program. Special-design economic education, personalized capital accumulation plans providing leveraged and un-leveraged earnings and asset protection/life income plans, and savings management planning programs generating 6% to 12% guaranteed life income are available to planning program participants.

1. Is your employer taxed as a “pass-through” entity? Yes \_\_\_ No \_\_\_
2. Are you under the age of 54? Yes \_\_\_ No \_\_\_
3. Do you currently have “emergency fund” cash savings equal to 3 months, or more, of your monthly living expenses? Yes \_\_\_ No \_\_\_
4. Do you have leveraged catastrophic loss protection against chronic or terminal illness? 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 \$250,000, or more, of equity assets you control? 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 \$20,000, 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 \$20,000, or more, of pension/401k plan/IRA savings allocated to risk of principal stocks or mutual funds? Yes \_\_\_ No \_\_\_
11. Do you have a defined benefit pension plan? Yes \_\_\_ No \_\_\_
12. Do you fund a 199A Plan? Yes \_\_\_ No \_\_\_

**5 or more “No” answers indicate that you are a candidate for the Highly Productive Individuals Planning Program. Your exposure to catastrophic losses, lack of a periodic savings plan, and a clear savings objective will prevent you from achieving financial stability and financial independence with maximum efficiency, control, and safety.**