

Financial Wellness Score Details for Demo Account  
Date

Assessing your financial health is an important step on your journey to financial wellness.



### Protection

Well done! You are doing a great job preparing for the unexpected through your insurance coverages!

For someone age 30-40 who is not retired and has one or more dependents

**GREEN**

Have the following coverage:

- Health insurance
- Disability insurance
- Life insurance
- Long-Term Care insurance or are prepared to cover expenses
- Critical Illness insurance or are prepared to cover expenses

Your current score

**YELLOW**

Have the following coverage:

- Health insurance
- Disability insurance

Don't have one or more of the following:

- Life insurance
- Long-Term Care insurance or are not prepared to cover expenses
- Critical Illness insurance or are not prepared to cover expenses

**RED**

Don't have one or more of the following:

- Health insurance
- Disability insurance



### Spending & Saving

Keep it going! Your spending habits are putting you on track toward a healthier future!

#### Interpreting your score:

**GREEN**

Typically never spend more than I make

Your current score

**YELLOW**

Sometimes spend more than I make

**RED**

Always spend more than I make



## Emergency Fund

Bravo! You're doing a great job preparing for a rainy day!

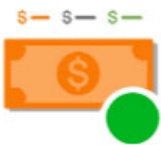
### Interpreting your score:

**GREEN**  
Can cover expenses for 6 months or more

**YELLOW**  
Can cover expenses for 3 – 5 months

**RED**  
Can cover expenses for less than 3 months

Your current score



## Retirement

Awesome! You've made preparing for retirement a priority!

Your estimated monthly retirement paycheck and goal:

myOrangeMoney®



**\$7,500**  
Estimated Monthly Income

**\$7,000**  
Estimated Monthly Goal

You are on track!

\* Your monthly goal amount is based on 70% of your income.

### Interpreting your score:

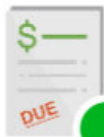
**N/A**  
We don't have a retirement income estimate for you

**GREEN**  
You are on track to meet your estimated monthly income goal

**YELLOW**  
You are on track to meet at least half of your estimated monthly income goal

**RED**  
You are on track to meet less than half of your estimated monthly income goal

Your current score



## Debt

Way to go! Minimizing your debt gives you the freedom to focus on other priorities!



### Interpreting your score:



#### GREEN

Don't carry over a credit card balance or don't use credit cards

Don't struggle to keep up with my debt payments or don't have any debt

Your current score



#### YELLOW

Carry over a credit card balance

Don't struggle to keep up with my debts or don't have any debt



#### RED

Typically struggle to keep up with my debt payments



## Other Goals

While you don't have other savings goals today, as your priorities change it can help to create a plan to achieve your dreams.

### Interpreting your score:



#### N/A

Besides retirement, I don't have other goals I'm interested in saving for

Your current score



#### GREEN

I'm on track for all my other savings goals



#### YELLOW

I'm not saving enough for at least one of my other savings goals



#### RED

I haven't started saving for at least one of my other savings goals

The Financial Wellness experience is an interactive, online experience that was created to help you get a clear picture of your current financial situation. Based on your situation, the interactive technology supplies you with information that may help you to improve your financial situation. Information provided through the Financial Wellness experience is provided for educational purposes only and is not to be viewed as investment advice.

Your financial health assessment is based on your answers to the Financial Wellness Assessment questions and, where applicable, information in myOrangeMoney®.

myOrangeMoney® is an educational interactive online experience that was created to help you get a clear picture of your monthly income needs in retirement and your current progress toward meeting them and is not to be viewed as investment advice. Its interactive technology enables you to see potential savings scenarios that are tailored to your personal circumstances, and supplies you with the information that may help you to improve your retirement outlook.