



The Private Wealth System™ Self-Check

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Is your wealth protected,
managed with intention,
and secured for the future?



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Is your wealth protected from life's biggest risks — not just market dips?

Do you have a living benefits policy that protects your income and health, not just your death?

Yes

Not

If you were to pass away or get sick tomorrow, would your family be financially secure without you?

Confidence: 01 02 03 04 05 06 07 08 09 10

Is your lifestyle and earning ability protected from unexpected illness, injury, or life disruption?

Yes

Not

How confident are you that your protection plan is built to withstand real-life risk, not just financial theory?

Confidence: 01 02 03 04 05 06 07 08 09 10

Are your assets structured and working together like a business — not a pile of accounts?

Do you have a structured estate plan (trust, will, or succession strategy)?

Yes

Not

Are your assets shielded from taxes, lawsuits, or unexpected loss with legal and financial strategy?

Yes

Not

Are your banking, insurance, investment, and business strategies fully integrated — or operating in silos?

Confidence: 01 02 03 04 05 06 07 08 09 10

How confident are you that your money is efficiently managed — flowing with purpose, not guesswork?

Confidence: 01 02 03 04 05 06 07 08 09 10

Are you growing with intention — and building true financial freedom?

Are your cashflow and savings growing safely, outside of just market risk or volatility?

Yes

Not

Do you have a defined strategy to grow and access wealth without relying solely on retirement accounts?

Yes

Not

Is your cash working for you — stored, deployed, and multiplied within a secure system?

Confidence: 01 02 03 04 05 06 07 08 09 10

How confident are you that your wealth plan is on track for real estate growth, tax-free income, and legacy transfer?

Confidence: 01 02 03 04 05 06 07 08 09 10

Final Score

Tally your Yes answers and
confidence ratings of 8–10.

If you score below 8 out of 12, your system may be
leaking wealth, efficiency, or long-term security.



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Book Your Private Strategy Session

Let's walk through your answers together and customize a Private Wealth System™ that's protected, managed, and secure — the RFS way.

[contact us](#)

