

# Economics of Life Research Project

## GenXers Planning Program Loss Test

The GenXers Planning Program component of the New Economic Order Planning Program provides productive individuals ages 36 to 52, who commit to saving 10%, or more of monthly earnings, special-design economic education, spending management, budget management, and savings management planning programs. If you have \$30,000 or more of annual earnings exceeding your lifestyle costs, you are qualified to participate in the Highly Productive Individuals Planning Program.

1. Do you have a 401k plan and/or IRA savings? Yes \_\_\_ No \_\_\_
2. Are you between the ages of 36 and 52? 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 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 \$20,000, or more, of accumulated savings? 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 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 401k plan/IRA savings allocated to risk of principal stocks or mutual funds? Yes \_\_\_ No \_\_\_
11. Do you control your employer? Yes \_\_\_ No \_\_\_
12. Do you fund your 401k plan employer match? Yes \_\_\_ No \_\_\_

**5 or more "No" answers indicate that you are a candidate for the GenXers 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.**