

Financial Literacy Checkpoint

FOR ADVISORS

New York Life Investments conducted an extensive qualitative and quantitative study on Women & Investing. Our research debunks a few myths, uncovers new truths and highlights opportunities to create a deeper sense of partnership. We learned:

- **While women are primarily in charge of household finances, there is a large disconnect when it comes to financial investments.**
- **Over 60% of women expressed interest in attending educational events related to finance.**
- **Female clients emphasized the importance of empathy, communication and alignment when it comes to their relationship with their Financial Advisor.**

With these insights in mind, New York Life Investments partnered with the National Financial Educators Council to provide you and your female clients an introductory quiz to help gauge your clients' level of understanding and proficiency pertaining to their financial future. We believe having a clear starting point will give you the opportunity to offer your clients educational events that address their specific needs and concerns, ultimately strengthening and deepening your relationships with them.

Please retain this page for your records and provide the questions to your client.

Scoring

1 – 9 **Below Average** 10 **Average** 11 – 12 **Good** 13 – 15 **Great**

Answer Key

1. C	5. A	9. D	13. A, B, C
2. C	6. B, C	10. C	14. D
3. C, D	7. B	11. B	15. D
4. A, D	8. C, D	12. C	

CLIENT NAME

SCORE

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INVESTMENTS

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