

Executive Dashboards - WealthCare - Customers

Provides key measures to evaluate the financial health and wellness of the neighbourhoods where customers reside, based on an imported customer file.

WealthCare | Overview

ENVIRONICS ANALYTICS

Customers : MobileScapes Extract - Visitors CEL: Unique visitors

The name of the customer file is at the top of the report.

548

Index: 112

WealthCare Overall Score

WealthCare Pillars

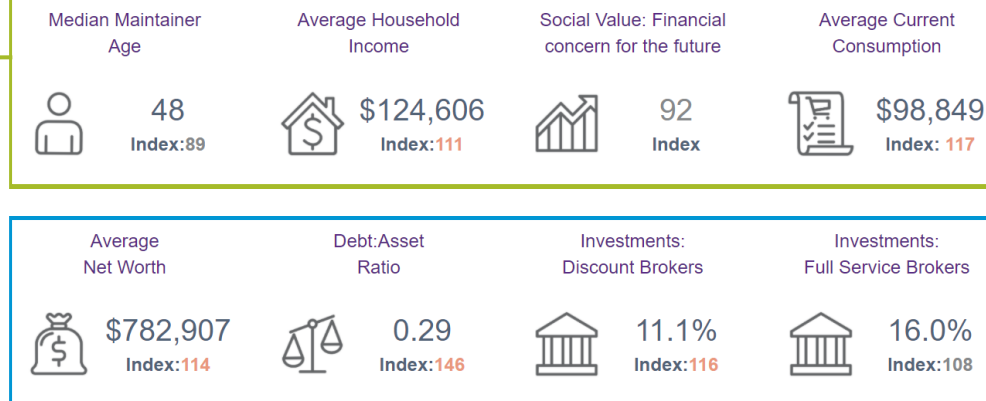


The WealthCare Overall Score and WealthCare Pillars provide key measures of the financial health and wellness of the estimated proportion of the customer file.

WealthCare Overall Score: An overall indicator of the financial health and wellness of the customers.
 Low Score = <290
 Medium Score = 290-649
 High Score = 650+

The Additional Characteristics section contains Demographic, Social and Financial data. Residents of the neighbourhoods where customers are found tend to be middle-aged (48), which is close to the Benchmark average (Index of 89). The Average Household Income for neighbourhoods in which the customers live is \$124,606, is 11% above the Benchmark average (Index of 111). They tend to have a moderate 'Financial concern for the future' (Index of 92). The Average Current Consumption of the neighbourhoods in which customers live is \$98,849 per household, 17% above the Benchmark average (Index of 117).

Additional Characteristics



Spending Score: Determines the likelihood that the customers are living within their means.
 Low Score = <250
 Medium Score = 250-619
 High Score = 620+

Leverage Score: Evaluates whether the customers have a balanced relationship between assets and debt.
 Low Score = <415
 Medium Score = 415-674
 High Score = 675+

Planning Score: Assesses whether the customers are making their financial future a priority.
 Low Score = <250
 Medium Score = 250-704
 High Score = 705+

Financial Acumen Score: Analyzes the degree that the customers self-invest, seek advice or hold a diversity of investments.
 Low Score = <250
 Medium Score = 250-619
 High Score = 620+

Here, the Average Net Worth the neighbourhoods in which the customers live is \$782,902. An Index value of 114 indicates that their net worth is above-average when compared to the Benchmark. The Debt:Asset Ratio is a ratio of total debt balance compared to the assets. With an Index of 146, it is above-average compared to the Benchmark. An above-average rate use Discount Brokers for their investments at above-average rates (Index of 116). They also have slightly above-average rates of using Full Service brokers for their investments (Index of 108).

Benchmark:Richmond Hill, ON (T)

The Benchmark for this report is Richmond Hill, ON.

Index Legend Under 80 Over 110