

## 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

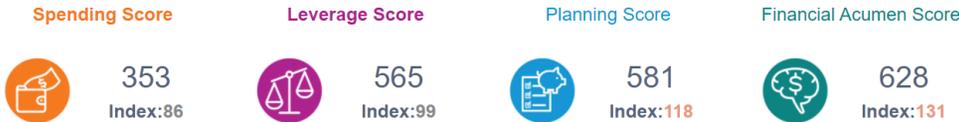
The name of the customer file is at the top of the report.

# 548

Index: 112

WealthCare Overall Score

#### WealthCare Pillars

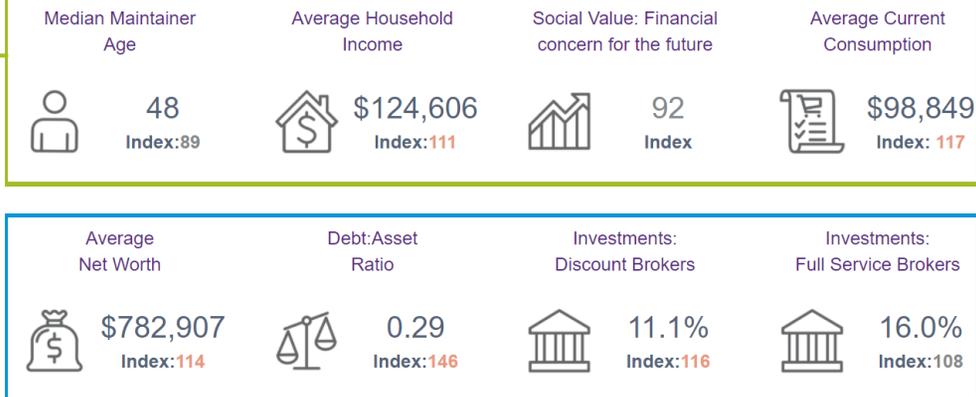


The WealthCare Overall Score and WealthCare Pillars provide key measures of the financial health and wellness of the estimated proportion of the customer file.

**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