

Executive Dashboards - WealthCare - Target Group

Provides key measures to evaluate the financial health and wellness of households within a specified Target Group.

WealthCare | Overview



Target Group : Mature Couples (04, 09, 16, 65)

The Target Group for this report is **Mature Couples**.

574

Index: 86

WealthCare
Overall Score

WealthCare Pillars



The Additional Characteristics section contains Demographic, Social and Financial data.

Households in the Target Group have a median maintainer age of **69**, which is older than the Benchmark average (Index of **127**).

The Average Household Income for households in the Target Group is **\$85,062** which is below the Benchmark average (Index of **66**).

Households in this Target Group tend to have a moderate 'Financial concern for the future' (Index of **107**).

Households in this Target Group have an Average Current Consumption of **\$65,723**, which is below the Benchmark average (Index of **67**).

Additional Characteristics



Here, the Average Net Worth for households in the Target Group is **\$730,651**. An Index value of **56** indicates that their Average Net Worth is below-average when compared to the Benchmark.

The Debt:Asset Ratio is a ratio of total debt balance compared to the assets. Here, with an Index of **91** the households in the Target Group have a ratio similar to that of the Benchmark.

Households in the Target Group use Discount Brokers for their investments at slightly below-average rates (Index of **90**), and have above-average rates of using Full Service Brokers for their investments (Index of **127**).

The WealthCare Overall Score and WealthCare Pillars provide key measures of the financial health and wellness of those within the Target Group.

WealthCare Overall Score: An overall indicator of the financial health and wellness of those within the Target Group.

Low Score = <290
Medium Score = 290-649
High Score = 650+

Spending Score: Determines the likelihood that those within the Target Group are living within their means.

Low Score = <250
Medium Score = 250-619
High Score = 620+

Leverage Score: Evaluates whether the Target Group has a balanced relationship between assets and debt.

Low Score = <415
Medium Score = 415-674
High Score = 675+

Planning Score: Assesses whether the Target Group is making their financial future a priority.

Low Score = <250
Medium Score = 250-704
High Score = 705+

Financial Acumen Score: Analyzes the degree that the Target Group self-invest, seek advice or hold a diversity of investments.

Low Score = <250
Medium Score = 250-619
High Score = 620+

Benchmark:Richmond Hill, ON (T)

The Benchmark for this report is **Richmond Hill, ON**.

Index Legend Under 80 Over 110