

# Doctors Economic Research Project

## GenXer Doctors Planning Program Loss Test

The GenXer Doctors Planning Program component of the New Economic Order Planning Program provides productive doctors 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 GenXer Doctors 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.**