

Your Freedom Profile.

A private, AI-authored briefing.

PREPARED FOR

Sample Household — Reference Copy

ISSUED

Sample — not a live report

FREEDOM SCORE

72

GRADE B+

OUT OF 100

SECTION 01

The four pillars, scored.

Every Freedom Profile scores four pillars out of 25. Together they roll up to your Freedom Score — a single, honest read on how prepared your household is for what comes next.

Wealth

21

/ 25

Diversified, disciplined savings.

Health

17

/ 25

HSA under-funded for the plan.

Protection

15

/ 25

Umbrella coverage gap flagged.

Legacy

19

/ 25

Trust drafted; beneficiaries current.

AI-AUTHORED SUMMARY

You've built a resilient foundation on Wealth and Legacy. The two levers with the highest expected impact this year are closing the umbrella-liability gap and fully funding the HSA — both are low-friction and materially change your protection profile before the next annual review.

SECTION 02

Your three priority actions.

Ranked by expected impact for a household with your profile. Each action is sized so it can be completed inside the next quarter without disrupting the rest of the plan.

1

Close the umbrella-liability gap

A \$1M umbrella policy aligns coverage with your household net worth and rental exposure.

2

Max the HSA before year-end

You're on a HDHP with room to contribute — triple tax advantage, unused this year.

3

Refresh the estate plan

Trust is 6 years old and pre-dates your second child. A 30-minute review keeps intent current.

MATCHED VERIFIED PROFESSIONALS™

Three pros aligned to these actions.

★ VERIFIED

Amara Okafor, CFP®

Fee-only financial planner

★ 4.9 client rating

★ VERIFIED

David Chen, JD

Estate & trust attorney

★ 4.9 client rating

★ VERIFIED

Priya Shah, ChFC®

Property & casualty broker

★ 4.8 client rating

SECTION 03

Your 12-month roadmap.

One clean move per quarter, sequenced so each builds on the last. Your Annual Freedom Review™ closes the year and resets the profile.



WHAT HAPPENS NEXT

Complete the 5-minute assessment and your live Freedom Profile is generated instantly. Every action, pro match, and quarterly step is personalized to your household — with none of your answers sold, shared, or used to train models.

Start free → freedomscoreapp.com

This is a sample Freedom Profile™ built with representative data. It is not personalized financial, legal, or tax advice and does not create a client relationship. Live profiles are generated from your own assessment answers.