New Online Wealth Assessment Quiz from Fragasso Financial Advisors Provides Perspective for High-Net-Worth Investors

Fragasso Financial Advisors has launched online wealth assessment quizzes to help investors evaluate financial planning, tax efficiency, and wealth goals.

PITTSBURGH, PA, UNITED STATES, July 3, 2026 /EINPresswire.com/ -- Fragasso Financial Advisors has introduced a new online wealth assessment quiz designed to help individuals evaluate the cohesiveness of their financial plan and better understand the long-term decisions that influence wealth preservation, tax efficiency, and multigenerational wealth transfer. The interactive educational resource encourages participants to assess key areas of their financial lives while identifying opportunities for more informed wealth planning.

For many high-net-worth investors, retirement planning is less about determining whether retirement is financially possible and more about making informed decisions that maximize wealth over time. Tax efficiency, charitable giving strategies, estate planning, investment management, healthcare costs, and creating a lasting legacy all become increasingly important considerations. The new assessment encourages users to evaluate these broader planning opportunities, helping them identify areas where a comprehensive financial strategy may enhance long-term outcomes for themselves, their families, and the causes they care about.

The online quiz walks participants through a series of questions related to retirement income, tax planning, and other key objectives such as charitable gifting. Upon completion, users receive insights on some of today's wealth building strategies and identify areas where additional planning may be beneficial. Rather than serving as a replacement for comprehensive financial planning, the assessment is designed to promote the importance of a fully coordinated financial plan, along with the guidance from financial professionals who advocate for your success.

Recognizing that financial planning needs often differ across life stages and personal circumstances, Fragasso Financial Advisors has also developed a companion assessment created specifically for women navigating significant financial transitions. The women's retirement assessment addresses planning considerations that may arise from career changes, divorce, widowhood, caregiving responsibilities, retirement timing, and other life events where thoughtful financial guidance can help individuals make informed decisions during periods of significant personal and financial change. By offering a dedicated educational resource, the firm seeks to acknowledge the unique questions many women encounter while making financial decisions independently.

The introduction of both assessments reflects a growing emphasis on financial education as an important part of understanding the broader picture. While investment performance remains an important component of building wealth, many decisions involve coordinating tax planning, retirement income strategies, Social Security timing, healthcare planning, estate considerations, and risk management. Interactive educational tools can help individuals better understand how these pieces fit together before making important financial decisions.

Fragasso Financial Advisors continues to expand its library of educational resources to help individuals and families make more informed financial decisions. In addition to retirement planning assessments, the firm's educational content includes articles and insights covering tax-efficient retirement income, charitable giving, equity compensation, estate planning, wealth preservation, and other topics that contribute to long-term financial well-being.

As your wealth increases and planning needs become more complex, educational resources like these can serve as a valuable starting point for organizing goals and understanding the decisions that may shape future outcomes. The new wealth assessment quizzes are intended to support that process by providing practical insights that help users think more strategically.

Both the wealth strategy assessment and the companion assessment for women are now available online, providing accessible educational tools for individuals seeking a better understanding of their unique planning needs and the impact it has today and into one’s legacy.

Investment advice offered by investment advisor representatives through Fragasso Financial Advisors, a registered investment advisor.

About Fragasso Financial Advisors, Inc.

Fragasso Financial Advisors, Inc. operates as an independent, primarily fee-based, employee-owned financial advisory establishment. Since its inception in 1972, the firm has been providing personalized financial planning and investment management services to individuals, non-profit organizations, and businesses. With a focus on long-term relationships and a commitment to providing an exceptional client experience, Fragasso Financial Advisors is a fiduciary, acting in their clients’ best interests with every decision.

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