

FAMILY LEGACY PYRAMID

Will you be able to give back to the community or the charities?

IS OUR COMMUNITY OK?

Charitable Desires

- Civic
- Religious
- Community Groups

Once you and your spouse are "OK," what does it mean for your family to be "OK?"

IS OUR FAMILY OK?

Estate Planning

- Multi-Generational
- Estate Settlement Costs

Estate/Asset Protection

- D,L,C, Fin. Mgmt., F.E.T.
- Distribution provisions
- Dynasty concerns – Bene. Prep. GSTT

Business Succession

- Exit Planning
- 529 Planning

You've succeeded in so many ways. But you may still wonder, "How much do we need to protect our lifestyle?"

ARE WE OK?

Retirement Income

- Income Dist.
- NQDC

Estate Planning Documents

- Estate Settlement Costs

Asset Preservation

- Investment ROR
- Life Expectancy
- D,L,C, Fin. Mgmt.
- Inflation
- Std of Living
- Risk Tolerance

Spousal/Partner Income Needs

- Property and Casualty
- Sickness and Injury
- Income Tax
- Long Term Care

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