



The Legacy Wealth Process

THE LEGACY JOURNEY

Helps you assess your current situation and clarify your dangers, opportunities and strengths



THE ROADMAP DESIGN

Develop a financial roadmap and organize financial affairs



THE DESTINATION PLOTTER

A series of planning sessions to help you plot your financial goals



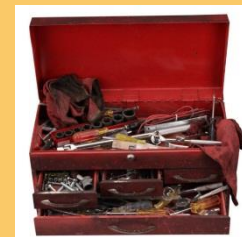
THE LEGACY WEALTH PLAN

A detailed wealth plan outlining the strategies, tools, and a course of action



THE TOOLBOX PLATFORM

Professional resources and strategies to ensure the successful implementation of your goals



THE REFLECTION MAGNIFIER

Regular reviews of your progress to keep you on track towards your goals



Goals of The Legacy Wealth Process

**Help to maintain and grow
your financial security**

**Helps to fulfill
your life goals**

**Help to protect and
enhance your lifestyle**

Working together as a team, we will develop strategies so you can enjoy greater personal and financial opportunities during your retirement:

- **Have a financial roadmap and organized financial affairs**
- **Be aware of all your dangers, opportunities, and strengths**
- **Feel comfortable that you will not outlive your money during your retirement**
- **Have a professionally prepared independent objective analysis**
- **Have a cash flow and net worth analysis, and know what cash reserves you will need**
- **Have a plan for transferring your wealth to reflect your values**
- **Have financial advisors you trust, working together as a team**
- **Have more free time knowing your financial affairs are in order**
- **Have a disciplined process for updates and reviews, and know what actions to take**
- **Enjoy your retirement and have a plan to live life on purpose.**



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