

360 LifeMap Strategies



clarify vision & future	harmonize work & life	create financial comfort	help & protect family	build a legacy
plan for the future financial planning retirement income estate planning	meet basic needs income planning expense/budgeting social security corporate benefits	simplify finances investment & savings home & assets business succession	help children savings loans & gifting special needs learning about money	execute intentions savings loans & gifting special needs learning about money
ease life's transitions marriage/divorce birth/death leaving my home career & profession	enhance lifestyle vacation home family trips & events hobbies & leisure lease v. buy	reduce taxes harvesting asset location restricted stock stock options	assist parents long-term care eldercare counseling medical & estate needs	help beneficiaries designations trusts & trustees valuation/projections
live my values clarify my mission give to community volunteer my time	manage health Medicare/supplemental long-term care wellness & nutrition	protect assets insurance corps/partnerships buy-sells defined benefit plans	fund education savings pre-paid tuition loans/grants/scholarships	give to charities planning & strategies low-basis investments tax-advantaged gifts

Depending on your goals, needs and unique situation, the insights and expertise of the following professionals may be required:

- Actuary
- Attorney
- Certified Public Accountant (CPA)
- Estate Attorney
- Fiduciary
- Geriatric Care Manager
- Insurance Broker (LHDLTC)
Life, Health, Disability, and Long-term Care
- Insurance Broker (P&C)
Property & Casualty
- Mortgage Broker
- Philanthropic Consultant
- Private Banker
- Real Estate Broker