Example

360 **Life**Map 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** wills & trusts POAs medical directives protect heirs
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
- Mortgage Broker
- Philanthropic Consultant
- Private Banker
- Real Estate Broker