

THE  
**13 Principles**  
OF  
**Complete**  
WEALTH  
MANAGEMENT

BY ORANGE CAPITAL MANAGEMENT

- 1.** create an **Investment** strategy.
- 2.** review and provide **Insurance**.
- 3.** manage **Liabilities**.
- 4.** set up a **qualified Retirement Plan** and/or **IRA Distribution**.
- 5.** select your **Corporate Executive Stock Option**.
- 6.** have a **Business Succession Plan**.
- 7.** establish a durable **Power of Attorney**.
- 8.** determine **Gifting** to Children, Descendents or Others during life.
- 9.** select **Charitable Gifting** during life.
- 10.** ensure proper **Titling of Assets**.
- 11.** name an **Executor/Successor Trustee**.
- 12.** create a **Distribution Plan** at death.
- 13.** select your **Charitable Inclinations** at death.