

FINANCIAL LIFE MAP

Helping & Protecting Family	Enjoying & Protecting Lifestyle	Planning Ahead	Creating Financial Comfort	Building a Legacy
Helping Children	Income Needs	Clarifying Vision	Managing Resources	Wills and Power of Attorney
Assisting Parents	Leisure Planning	Health Challenges	Generating Income	Estate Transfer
Funding Education	Personal Health	Managing Change	Minimizing Taxes	Charitable Giving
Retirement Transition Planning	Protecting Assets and Business	Life Transition Planning	Working with an Advisory Team	Living Legacy

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Helping &
Protecting Family

Enjoying &
Protecting Lifestyle

Planning
Ahead

Creating Financial
Comfort

Building a
Legacy

Notes: