



Minimizing Dangers Maximizing Opportunities

INTEGRATED PLANNING



SAMPLE RESULTS

Example	Net Worth	Estate Tax Saved	Income	Income Tax Saved	Charity
1	20M	5M	2.5M	480k/year	-
2	50M	12M	1.6M	1.8M*	42.5M
3	64M	15M	7.5M	350k/year	2M**
4	80M	20M	7.5M	600L/1 time	64M + annual gifts of 2M

* Over 5-6 years

** Current CRT Later (20M)

OUR PROCESS

DISCOVERY

DESIGN

IMPLEMENT

MAINTAIN

Fact Finding

Goal Setting

Goal Prioritization

Current Balance Sheet

Current Cash Flow

Danger

Opportunities

Cash Flow

Income Tax Reduction

Asset Protection

Disability Protection

Wealth Transfer

Estate Tax Transfer

Business Exit/Succession

Liquidity Planning

Charitable Planning

Legal

Financial

Insurance

Compliance

Plan Review

Plan Compliance

Changes in law

Changes in goals

Changes in situation