



Legacy Provider Blueprint

A step-by-step roadmap for how to grow money tax efficiently, maximize retirement income, eliminate wealth leaks, and safeguard from market losses.

PHASE 1

ANALYSIS



1. Personal Cash Flows

Learn how your money flows and the importance of maintaining balance in your financial life.



2. Retirement Readiness

Get the answers to the four most important financial questions everyone needs to know.



3. Present Position

See all of your income, expenses, liabilities and assets at a glance so you know where you stand.

PHASE 2

EDUCATION



4. Eliminate Wealth Leaks

Discover the major areas you may be losing money unknowingly and unnecessarily.



5. Access to Capital

Learn how to best pay for large capital purchases such as cars, weddings, college, etc.



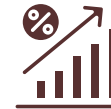
6. Protect Your Assets

Learn how to protect your assets and guarantee that what you want to happen will happen.



7. Future Position

See your revised position so you can see the impact on your future taxes, net worth & cash flow.



8. Compounding

Utilize a savings account that grows your money tax-deferred & provides tax-free retirement income.



9. Distribution Strategy

Learn which assets to spend down in what order so you reduce taxes and maximize retirement income.