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.

PHASE 3
GROWTH

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.