## THE WEALTH MANAGEMENT FORMULA

Relationship

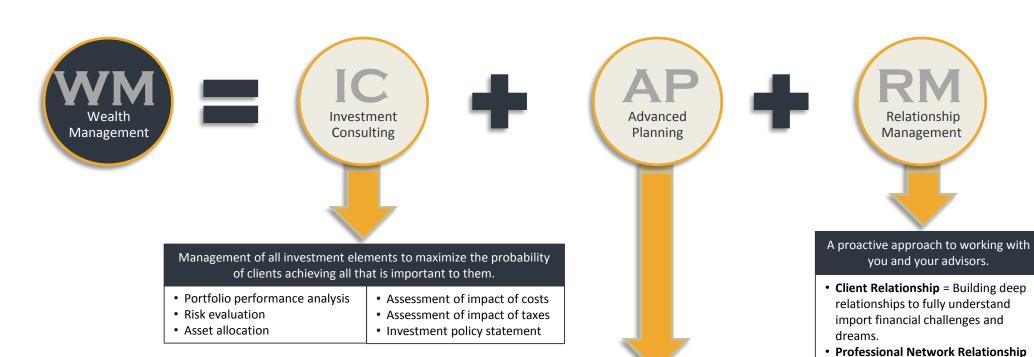
Management

you and your advisors.

professionals (lawyers, etc.) to bring

= Managing a network of

the needed expertise.



Planning in four focus areas, beyond your investments:			
Legacy	+ Protection	+ Independence	+ Succession
<ul> <li>Estate &amp; Legacy Planning</li> <li>Estate Planning Guidance</li> <li>Planning for Family Gifts</li> <li>Wills , Trusts, POAs</li> <li>Legacy Tax Planning</li> </ul>	Asset Protection     Income Protection     Insurance Analysis     Protecting Assets     Entity Structure	Financial Independence  Retirement Planning  Tax Saving Strategies  Debt Strategies  Cash Flow & Budgeting	Business & Executive Succession • Stock Options • Business Succession • Buy-Sell Planning
FULLY INTEGRATED TAX STRATEGY OVERLAY			