

# The Four Main Challenges To Building Wealth



## Dream

### The Vision Game Plan

Identify your present financial position, lifestyle objectives, and how to properly set and achieve goals.

- ✓ Identify most important lifestyle objectives
- ✓ Gather all financial data/statements personal information
- ✓ Develop your personal financial wish list
- ✓ Discover your true purpose for money



## Envision

### Risk Exposure and Gap Analysis

Test the health of your current financial position: Evaluate your economic exposure, tax liability and market risk. Simultaneously evaluate opportunities

- ✓ Create a current position snapshot
- ✓ Produce your financial score card
- ✓ Stress test current strategies against new solutions
- ✓ Recover lost money and put it back to work



## Create

### The Efficient Capital Management Matrix®

Set up your financial model, identify key implementation strategies and employ your personal CFO to educate, guide and counsel you toward reaching your full financial potential.

- ✓ Real-time view of your entire financial life
- ✓ Establish key objectives for your financial model:  
*Protection, Assets, Cash Flow, Liabilities*
- ✓ Holistic tax and estate planning
- ✓ Strategies measured against their ability to meet stated objectives



## Succeed

### Action Accelerator

Tools and services are implemented to help you maintain financial balance, track your progress, achieve your goals, and effectively react to life's changes.

- ✓ Comprehensive family office strategy
- ✓ Real-time view of your current financial position
- ✓ Daily monitoring of your financial health
- ✓ Regular stress testing and review