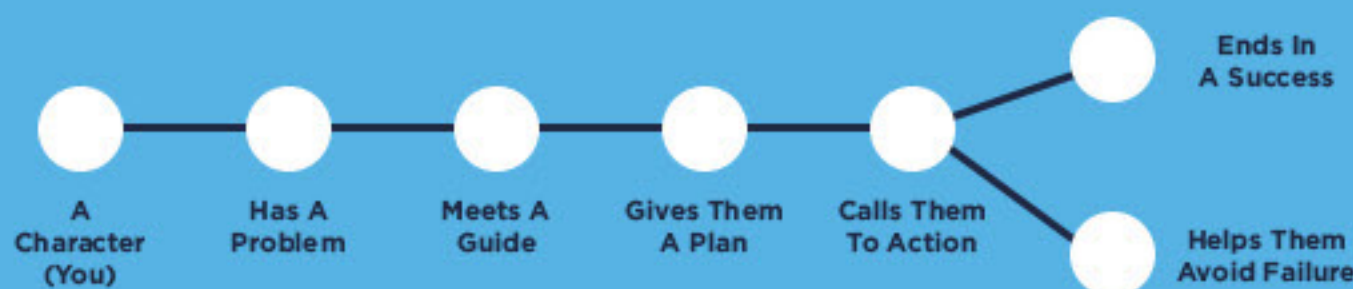




MASTER YOUR WEALTH MISSING CHAPTERS IN YOUR FINANCIAL STORY

We all have a story. Your life story and path are completely unique. You own this journey, the good and the bad. By contrast, a financial story is your life journey and your relationship with financial resources. Classic movies have shown us the formula for what makes a great script.

WHAT MAKES FOR A GOOD FINANCIAL STORY?



You are the main character in your financial story. A "problem" can take many forms. Some problems are actually transitions or opportunities where important decisions need to be made.

Adding a second and third Observer brings further context, contrast, and enhanced clarity to the issue. While this is a simple example using a cube, the same concepts can be extended to more complex objects or for this discussion, financial and life



FOUR MISSING CHAPTERS IN YOUR FINANCIAL STORY:

1

Organize Your Goals

2

Assemble Your Resources

3

Align Your Strategies

4

Prioritize Your Tactics

CHAPTER 1: ORGANIZE YOUR GOALS

This is one of the most complex aspects of answering the question, "Am I on Track?" If needed, your Guide (Advisor) should be able to skillfully lead a conversation to help you articulate your definition of a *good life* now, and in the future. Everyone has Basic Living expenses and Healthcare Costs as **Needs**. Your definition of a good life may include other examples such as those below.



Travel



Education



Home Improvement



Second Home



Provide Care



New Business



Donations/Gifts



Celebration

Needs



Essential Expenses

Wants



What You Would Like to Have

Wishes



What You Hope to Aspire Towards

[PREVIEW] CHAPTER 2: ASSEMBLE YOUR RESOURCES



Liquid Assets

Cash, Stocks, Bonds, Mutual Funds
Exchange Traded Funds, Crypto

Illiquid Assets

Real Estate, Business Interests,
Commodities, Collections

Intangible Assets

Professional & Personal Identity,
Career, Family, Community

GET STARTED WITH CHAPTER 1 TODAY!

Is it time for you to engage with your goals, resources, strategies, and tactics?

A relationship with a trusted advisor in which you have a personal connection and who is skilled in leading these conversations can make all the difference. We are here to help and guide.