360 **Life**Map Strategies

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| --- | --- | --- | --- | --- |
| clarify vision& future | balance work& life | create financial comfort | help & protect family | build alegacy |
| **plan for the future**financial planningretirement incomeestate planningbusiness succession | **meet needs**income planningexpense/budgetingsocial securitycorporate benefits | **simplify finances**investment & savingshome & assetsautomateaggregate | **help children**allowance & savingsloans & giftingspecial needslearning about money | **execute intentions**wills & trustspower of attorneymedical directivesprotect heirs |
| **ease life’s transitions**marriage/divorcebirth/deathleaving my homecareer & profession | **enhance lifestyle**vacation homefamily trips & eventshobbies & leisurelease v. buy | **reduce taxes**tax-loss harvestingasset locationstock options strategies | **assist parents**long-term careeldercare counselingmedical & housing  | **help beneficiaries**designationsspecial needstrusts & trusteesvaluation/projections |
| **live my values**clarify my missiongive to communityvolunteer my timealign investments | **manage health**medicare/supplementallong-term carecare conciergewellness & nutrition | **protect assets**insuranceliquiditybusiness continuitycorporate structure | **fund education**savings & investmentspre-paid tuitionstudent/parent loansgrants/scholarships | **give to charities**planning strategiestax-advantaged giftslow-basis assets |

360 **Expert** Team

**Depending on your goals, needs and unique situation, the insights and expertise of the following professionals may be required:**

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| * Actuary
* Business Attorney
* Certified Public Accountant (CPA)
* Estate Attorney
 | * Fiduciary
* Geriatric Care Manager
* Life, Health, & Disability Insurance Specialist
* Property & Casualty Insurance Broker
 | * Mortgage Broker
* Philanthropic Consultant
* Private Banker
* Real Estate Broker
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