360 **Life**Map Strategies

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| clarify vision  & future | balance work  & life | create financial comfort | help & protect family | build a legacy |
| **plan for the future**  financial planning  retirement income  estate planning  business succession | **meet needs**  income planning  expense/budgeting  social security  corporate benefits | **simplify finances**  investment & savings  home & assets  automate  aggregate | **help children**  allowance & savings  loans & gifting  special needs  learning about money | **execute intentions**  wills & trusts  power of attorney  medical directives  protect heirs |
| **ease life’s transitions**  marriage/divorce  birth/death  leaving my home  career & profession | **enhance lifestyle**  vacation home  family trips & events  hobbies & leisure  lease v. buy | **reduce taxes**  tax-loss harvesting  asset location  stock options strategies | **assist parents**  long-term care  eldercare counseling  medical & housing | **help beneficiaries**  designations  special needs  trusts & trustees  valuation/projections |
| **live my values**  clarify my mission  give to community  volunteer my time  align investments | **manage health**  medicare/supplemental  long-term care  care concierge  wellness & nutrition | **protect assets**  insurance  liquidity  business continuity  corporate structure | **fund education**  savings & investments  pre-paid tuition  student/parent loans  grants/scholarships | **give to charities**  planning strategies  tax-advantaged gifts  low-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 |