

FOUR DIMENSIONAL PLANNINGSM

TRADITIONAL PLANNING

*Manages what you
HAVE*

FINANCIAL MATTERS

- Investments
- Businesses
- Insurances
- Taxes

LEGAL MATTERS

- Legal will
- Trusts
- Powers of attorney
- Asset protection

LEGACY PLANNING

*Manages what you
KNOW*

PERSONAL MATTERS

- Values & traditions
- Life lessons
- Timeless memories
- Accomplishments

PRACTICAL MATTERS

- Location of key documents
- Household maintenance
- Care of children & pets
- Funeral arrangements

BREADCRUMBSSM