

**Lifetime Solution™ Process**

**Interior**

**Exterior**

**Future**

**Coaching**  
Dreaming  
Possibilities  
Authentic Goals  
Consciousness

**Goal Setting**  
Education Funding  
Retirement Funding  
Special Goal Funding  
Risk Management  
Estate Planning

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**Present**

Authentic Behavior  
Integrity  
Clarity  
Abundance Mentality  
Commitment

**Financial Status**  
Net Worth Statement  
Cash Flow Analysis  
Investment Allocation  
Risk Tolerance

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**Past**

**Counseling**  
Beliefs  
Family History  
Family Dynamics

**Background**  
Tax Returns  
Wills  
Employee Benefits  
Investment History