

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

Present

Counseling

Beliefs
Family History
Family Dynamics

Financial Status

Net Worth Statement
Cash Flow Analysis
Investment Allocation
Risk Tolerance

Past

Background

Tax Returns
Wills
Employee Benefits
Investment History