

discovery

clarity



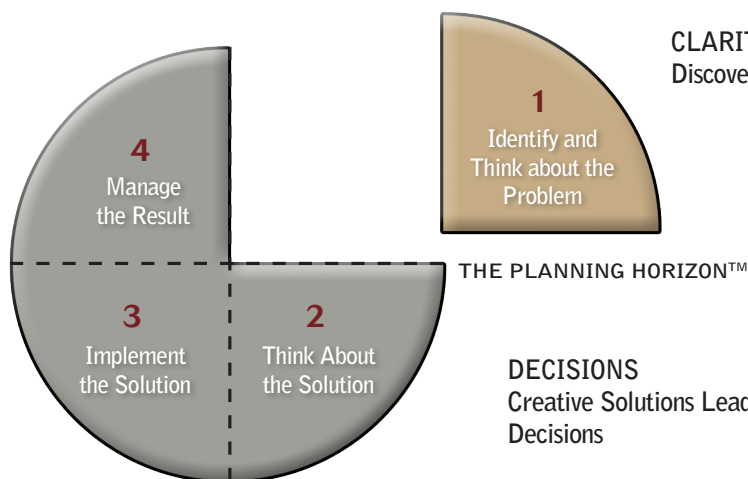
The Discovery Phase™

THE LEGACY WEALTH OPTIMIZATION SYSTEM™

Mission, Vision, Values & Goals
What planning gaps are we trying to close and why?

CONFIDENCE
Management Leading
to Confidence

CLARITY
Discovery Leading to Clarity



RESULTS
Implementation
Leading to Results

DECISIONS
Creative Solutions Leading to
Decisions

Strategies, Tactics And Tools
Who will help us close our planning gaps and how?

Previous Phase:

The Discovery Profile: Establishing the place of most potential

The Discovery Phase - Clarifying what you are trying to achieve and why

Goals:	Clarifies all relevant factors impacting the goals and objectives identified and documented in the Discovery Profile Process.
Family Capital:	Clarifies and documents all financial and human capital available to accomplish your goals and objectives.
Current Financial Outcomes:	Clarifies and documents the results that will be achieved under your current plan without improvement.
General Health and Well Being:	Clarifies and documents factors effecting the general health and well being of each family member.
Unique Journey:	Clarifies and documents life experiences that have shaped your family and the intersection between the family's human and financial capital.
Values, Attitudes & Preferences:	Clarifies and documents the values, attitudes and preferences that have evolved within your family as a result of your unique journey and life experience.
Important Documents:	Clarifies, reviews and organizes all important documents.

Next Phase:

The Creative Solutions Phase: Leveraging clarity to make wise choices

Helping you make wise financial decisions.

discovery

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The Discovery Phase™

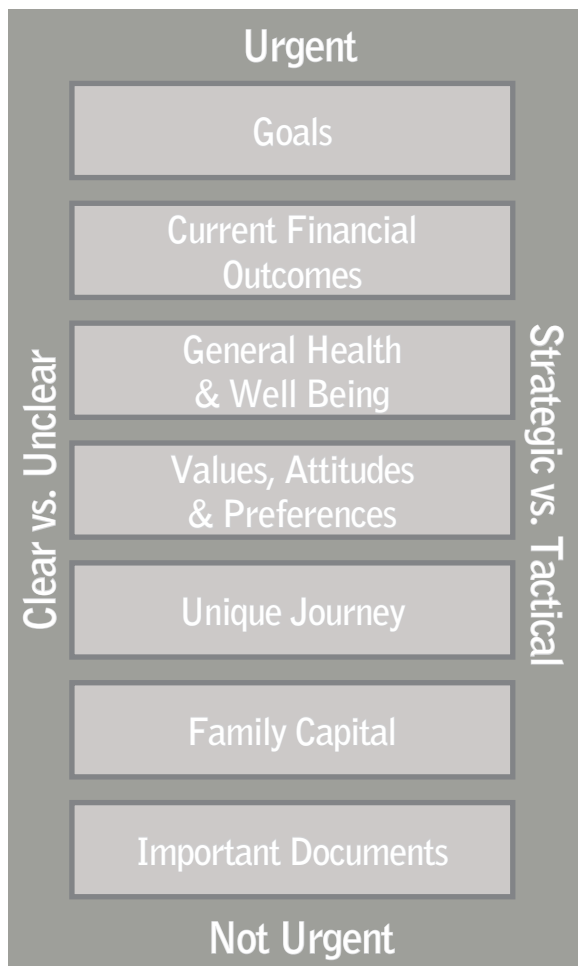
THE LEGACY WEALTH OPTIMIZATION SYSTEM™

Client Name(s)

Date

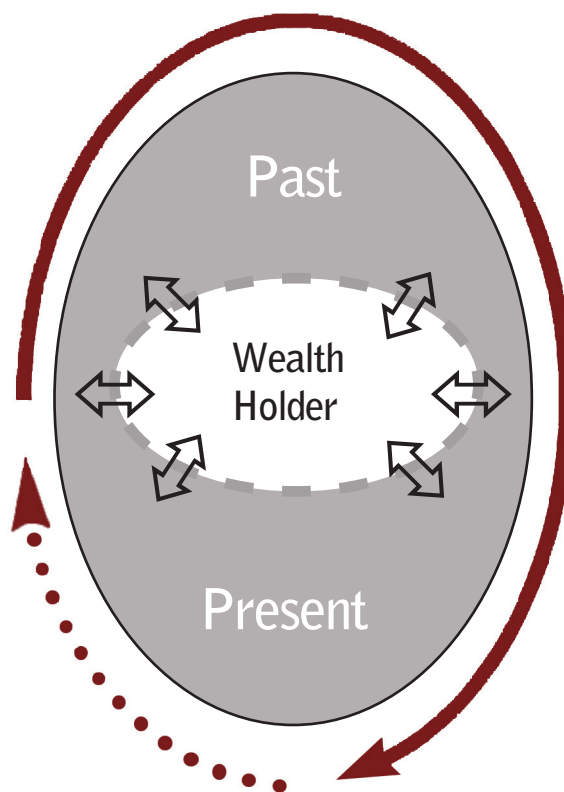
THE DISCOVERY
PROFILE™

Priority



Discovery

Insight



Knowledge

Clarity

THE PLANNING HORIZON™

The Creative
Solutions
Phase

Helping you make wise financial decisions.



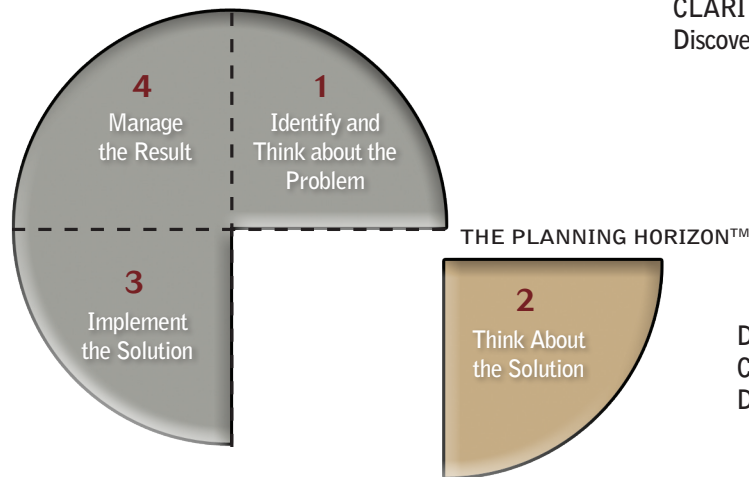
The Creative Solutions Phase™

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Previous Phase:

The Discovery Phase: Clarify what you are trying to achieve and why

The Creative Solutions Phase - Leveraging clarity to make wise choices

Virtual Team Construction & Management:	Confirms and assesses your Core Team
Team Briefing:	Briefs the Core Team regarding each gap identified in The Discovery Phase and why it is important to close each gap.
Strategy Design Session:	A meeting of Core Team to review and discuss possible strategies for closing the assigned planning gaps.
Strategy Design Team Assignments:	Each planning gap is assigned a Strategy Design Team with the responsibility to identify, refine, select and model an acceptable solution for closing their assigned gaps.
Proposed Wealth Design:	Each selected strategy is integrated into an overall model that reflects the incremental and cumulative results achieved.
Client Briefing:	The Proposed Wealth Design and each integrated strategy are reviewed for Deployment. The plan is either approved or returned to the team for further consideration.

Next Phase:

The Strategy Deployment Phase: Converting decisions into results.

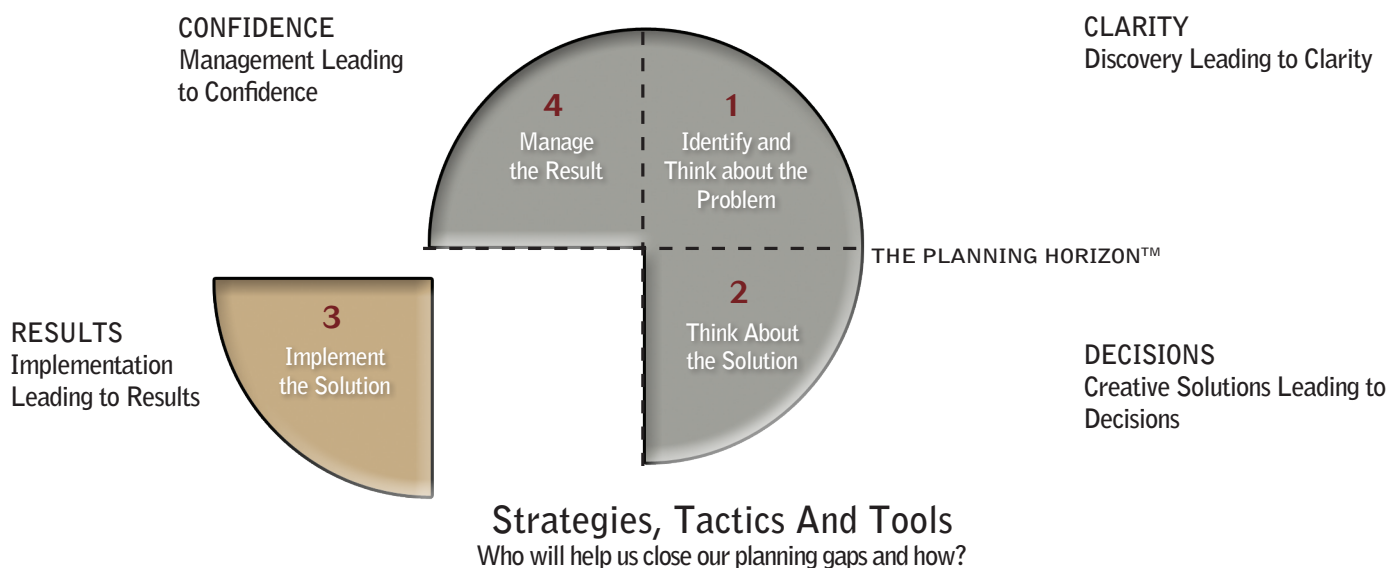
implementation

results



The Strategy Deployment Phase™ THE LEGACY WEALTH OPTIMIZATION SYSTEM™

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Previous Phase:

The Creative Solutions Phase: Leveraging clarity to make wise choices

The Strategy Deployment Phase - Converting decisions into results

Team Briefing:	Briefs the Core Team regarding each strategy selected in The Creative Solution Phase.
Strategy Deployment Team Assignments:	Each strategy is assigned to a Strategy Deployment Team for implementation.
Strategy Deployment Protocol:	Each strategy Deployment Team creates a protocol outlining the steps for effective implementation.
Strategy Modifications or Refinements:	Deployment Teams identify strategy modifications, if any, that are necessary for effective implementation.
Client Briefing:	The Implementation Protocol for each strategy is reviewed prior to final deployment. The strategy is either approved for deployment or returned to the team for further consideration.
Strategy Deployment:	Each approved strategy is implemented.

Next Phase:

The Results Management Phase: Maximizing confidence by managing results.

Helping you make wise financial decisions.

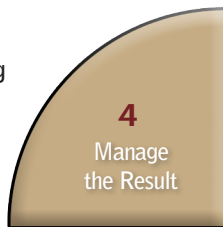


The Results Management Phase™

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The Results Management Phase - Maximizing confidence by managing results

The Management Assessment:	Reviews the current management protocol and assesses effectiveness.
The Management Protocol:	Revises and updates management protocol as necessary to increase effectiveness.
The Team Briefing:	Briefs team regarding each implemented strategy and discusses results management issues.
Strategy Maintenance Protocol:	Establishes and documents the Protocol for each strategy implemented in the previous planning cycle.
Strategy Maintenance:	Implements The Strategy Maintenance Protocol for each strategy.
The Discovery Review:	Reviews and updates all discovery documentation to reflect the previous planning cycle.
The Gap Assessment:	Reviews gaps that were not addressed in the previous planning cycle and identifies new gaps that have emerged since the last Discovery Phase was conducted.

Next Phase:

The Discovery Profile: Initiating the Discovery Phase.