

CLIENT: _____



POSITION

PROJECT

PROTECT

PAYOFF

PERPETUATE

- ☐ Soc Sec Struts _____
☐ Pension Projections _____
☐ 401K & IRA Struts _____
☐ Life Insurance Struts _____
☐ Investment & Mkt Struts _____
☐ Brokerage Statements _____
☐ Bank Account Struts _____
☐ Red _____ %
☐ Yellow _____ %
☐ Green _____ %
☐ Trusts & Wills _____
☐ Beneficiaries & Educare _____
☐ POAHC & HCD _____
☐ Mortgage & CC Struts _____

- ☐ Cost of living _____
☐ HealthCare COL _____
☐ Income taxes _____
☐ Future values _____
☐ Value of estate _____

- ☐ From inflation _____
☐ From bear market _____
☐ From investment fees _____
☐ From income taxes _____
☐ From capital gains tax _____
☐ From opportunity costs _____
☐ From healthcare costs _____

- ☐ Soc Sec when/how much _____
☐ Pension decisions _____
☐ Monthly Mailbox Money _____
☐ Red _____ %
☐ Yellow _____ %
☐ Green _____ %

- ☐ Bere decd(s) _____
☐ Bere TOD _____
☐ Probate protection _____
☐ Estate Tax Eliminated _____
☐ HealthCare financed _____
☐ Living Trust(s) _____
☐ Pour-over will(s) _____
☐ POAHC(s) _____
☐ HealthCare Directive(s) _____
☐ TrueWealth systematized _____

FIVE STEPS TO TRUEWEALTH

One of our core values at **WEALTHCARE** is living a life of **ABUNDANCE**. Whatever abundance means to you, by its very definition it means "more." More time with your grandchildren, more vacations, more time for your hobbies or reading, more control over your life and your time. Our involvement in designing your retirement is all about giving you more, so you can live a life of abundance. **TRUEWEALTH** doesn't consist of more money, or more stuff. Instead, it's comprised of those things that money can't buy, and death can't take away like meaningful relationships, incredible experiences of a lifetime, and memories made with family and friends. What we do in designing a retirement is to provide more abundant results in terms of money and time, so you can accumulate **TRUEWEALTH**. Five Steps to **TRUEWEALTH** that helps you to organize and structure your retirement so you can have more of what money can't buy and death can't take away.

THESE FIVE STEPS ARE PROVEN, AND WE'LL GUIDE YOU CAREFULLY ALONG EACH STEP OF THE WAY TO INSURE THAT IN THE END, YOU CAN EXPERIENCE THE MOST ABUNDANT LIFE POSSIBLE.



WEALTHCARE
Tax & Investment Advisors