

**PRIMARY CONTACT**

Full Name: \_\_\_\_\_

Email Address: \_\_\_\_\_

Contact Number: \_\_\_\_\_

**SPOUSE CONTACT**

Full Name: \_\_\_\_\_

Email Address: \_\_\_\_\_

Contact Number: \_\_\_\_\_

**HOME ADDRESS**

Street: \_\_\_\_\_ City/State/Zip: \_\_\_\_\_

# W.E.A.L.T.H.

**PLEASE RANK YOUR CONCERNS IN THE SIX CRITICAL AREAS.**

**W. WEALTH PROTECTION & GROWTH**  
Build and protect assets through informed investment strategies and risk awareness.  
 Concerned    Unsure    Well Prepared

**E. ESTATE PLANNING**  
Establish a clear legacy with legal structures that direct how your wealth is preserved and transferred.  
 Concerned    Unsure    Well Prepared

**A. ALWAYS PREPARED FOR THE UNEXPECTED**  
Anticipate life's surprises with emergency savings and comprehensive insurance planning.  
 Concerned    Unsure    Well Prepared

**L. LEVERAGE INCOME EFFECTIVELY**  
Let every dollar have a purpose-optimize cash flow, benefits, and earning strategies.  
 Concerned    Unsure    Well Prepared

**T. TAX REDUCTION**  
Time, structure, and plan your finances to minimize taxes today and in the future.  
 Concerned    Unsure    Well Prepared

**H. HOLISTIC INTEGRATION**  
Harmonize all five pillars so your financial life moves in one coordinated direction.  
 Concerned    Unsure    Well Prepared

**FOLLOW UP**

**Would you like a complimentary evaluation meeting with one of our registered advisors?**  
 Yes    No

**Appointment preference?**  
 Video Conference  
 In-Office Visit

Your Address HERE