



# The Legacy Provider Blueprint

A proven framework to grow wealth tax-efficiently, create reliable retirement income, protect against market loss, and transfer your legacy with intention.

## PHASE 1

### FOUNDATION



#### 1. Financial GPS

Gain clarity on the four financial questions that determine your future — so you can make confident, informed decisions.



#### 2. Your Financial Snapshot

See your full financial picture in one place—income, expenses, assets, and liabilities—so you know exactly where you stand.

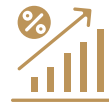


#### 3. Your Optimized Plan

Compare your current path to a strategically optimized plan — so you can see the impact on your income, taxes, and long-term wealth.

## PHASE 2

### GROWTH



#### 4. Tax-Advantaged Growth

Leverage strategies designed to grow your money tax-deferred, protect against market loss, and create tax-efficient income.



#### 5. Be Your Own Bank

Access capital on your terms—without relying on traditional lenders for major life purchases.



#### 6. Income Strategy

Create a smart withdrawal plan that reduces taxes and maximizes your retirement income.



#### 7. Protect Your Wishes

Ensure your will, trust, healthcare directives, and power of attorney are in place — so your decisions are honored.



#### 8. Simplify for Your Family

Organize your financial life so your loved ones can navigate everything with clarity, confidence, and peace of mind.



#### 9. Your Legacy Message

Capture your story, values, and wisdom in a meaningful way — so your voice lives on for generations.