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.

PHASE 3
LEGACY

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.