

# Formula for Transition Wealth Management Discovery

## Emotions & Thoughts

- Clarify Values
- Goals, Dreams, and Desires
- Completion of Impacting Issues

plus

## Theory & Process

- Completion of Wealth Management Discovery
- Design Strategy
- Create Wealth Management Action Plan

Equals

## Implementation of Your Wealth Management Action Plan

- Wealth Management Services
- Investment Advisory Services

# Theory & Process

## **I. Completion of the Wealth Management Discovery form.**

Collecting the facts, or building blocks, is an important step in building a Wealth Management Action Plan. We ask that you complete a Wealth Management Discovery form, and provide copies of relevant documents and tax returns. (A complete list of helpful documents is included with the Discovery form.)

When compiling your data, it is important to provide all the information requested to the best of your ability, including all documents. This is important to accurately understanding your current situation.

## **II. Design Strategy**

Your answers to the Emotion & Thoughts section are used to design an over-all strategy for your Wealth Management Action Plan. Your input is critical in designing your strategy – the more precise you are in your answers, the more accurately we can design your strategy.

## **III. Create the Wealth Management Action Plan**

A *Wealth Management Action Plan* is created specifically for you based upon your personal values, goals, and unique circumstances. The Plan focuses on cash flow, taxes, and net worth, with an emphasis on estate planning and planned giving.

# Emotions & Thoughts

## I. Clarify Values

- What is important about **Personal Freedom** to you?
- What is important about **Personal Financial Freedom** to you?
- What is important about **Family** to you?
- What is important about **Community** to you?
- What is important about **Heritage** to you?

## II. Spell out Goals, Dreams, and Desires

- What are your specific **Goals**?
- What are your specific **Dreams**?
- What do you **Desire**?

III. Complete Impacting Issues (if applicable) from your *Impacting People's Lives At Their Point Of Need* workbook.