

A hiker wearing a white t-shirt, shorts, and a hat stands on a large, reddish-brown rock formation. The hiker is looking out over a vast canyon with layered rock walls and a valley below. The sky is blue with some clouds.

THE IMPACTING PROCESS

FORMULA FOR TRANSITION

THOUGHTS & IDEALS

- Clarify Values – the “5 Keys”
- Goals, Dreams, and Desires
- Completion of Impacting Issues

PLUS

THEORY & PROCESS

- Compile Personal Data
- Analyze Information
- Create an Impacting Strategy

EQUALS

IMPLEMENTATION OF YOUR

IMPACTING STRATEGY

- Investment Advisory Services
- Estate Design / Wealth Transfer
- Planned (Structured) Gifting
- Other Services