The Impacting Process

Our Impacting Process assists individuals who have accumulated talents and resources to enjoy and share their wealth. The process focuses on five key areas:
Personal Freedom, Personal Financial Freedom, Family, Community, and Heritage.

Before beginning the process, you should ask yourself:

- What is working well in my life?
- What is my greatest challenge at the moment?
- Where do I perceive that I need assistance?

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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

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Thoughts & Ideals

I. Clarify Values – the "5 Keys"

- 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 specific ***Goals*** do you have?
- What unfulfilled ***Dreams*** do you have?
- What are your immediate ***Desires***?

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

Theory & Process

I. Compile Personal Data.
Collecting the facts, or building blocks, is an important step in building an Impacting Strategy. We ask that you complete a data form, and provide copies of relevant documents and tax returns. (A complete list of helpful documents is included with the 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. Analyze Information
Your Plan needs to meet your needs. We work with you to determine your ideal Cash Flow, Taxes, and Net Worth. Our goal is to help you meet these goals.

III. Create an Impacting Strategy
An Impacting Strategy is created specifically for you based upon our analysis of all the data provided, including your responses to the Thoughts and Ideals page and your unique circumstances. The Strategy focuses on cash flow, taxes, and net worth, with an emphasis on investment policy, estate design and planned giving.

Implementation of Your Impacting Strategy

I. Investment Advisory Services

- A. Create the written Investment Policy Statement (the IPS)
- B. Implement the IPS
- C. Retirement Plan Services. We can help plan personal IRA's, corporate Qualified Plans, and Carve-Out Plans for business owners.

II. Estate Design and Wealth Transfer

- A. Estate preservation and/or accumulation
- B. Tax implications?

III. Planned (Structured) Gifting

IV. Other Services

- A. Business Advisory Services, such as
  - Business Succession Planning
  - Tax Planning
  - Cash Flow Analysis & Debt Planning
- B. Insurance Consulting (life, long term care, disability)

*Some services are out-sourced to professionals who do strategic partnering with P.R.O.F.I.T. Financial, LLC. P.R.O.F.I.T. Financial, LLC does not provide legal or tax advice. Attorney(s) and Accountant(s) must be consulted for legal and/or tax advice.

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