

Strategic Process

Discover

Understanding *Financial Junk Drawer*, *the Rules of the Game* and *Money is not Math, Math is Not Money™* provides you with a new paradigm to constantly view financial world.

1

START

Identify

1) No Data 2) Partial Data 3) Full Data

We can proceed together in a variety of ways. The more data you choose to provide, the more precise and relevant our work is likely to be.

2

ORGANIZE

Visualize

Using your “financial game board” you can see and understand how your income, assets, liabilities, and insurance may be optimally positioned, coordinated, and integrated.

3

STRATEGIC ANALYSIS

The Leap Model™

Internal Design™

Money Strategies™

Implement

Having identified opportunities or problems based on the Leap Model™, you will decide which actions you want to make in seeking to improve your financial position.

4

ACTION

Achieve

By simultaneously increasing the efficient and effective use of your money, implementing any desired action items, and participating in periodic reviews and updates, we seek to help you create greater financial opportunity and peace of mind.

5

ACHIEVE