

# A life defined starts here.

Many people set goals, yet on average they only attempt them less than once. Those who do reach their goals attribute their success to setting tangible, measurable objectives – and pursuing them with focus and determination, even when faced with challenges.

We'll work with you to design a plan for your wealth and a strategy for overcoming any perceived obstacles that stand in your way. You have a vision for what it means to achieve a more balanced, fulfilling future. It's our job to help you get there.

## START

Using our holistic wealth-management process, RICH, we'll help you overcome potential roadblocks as you move closer to a more defined life.

OR

From minor hiccups to abject failure, here are some surprising examples of even the most accomplished people encountering challenges.



### THOMAS EDISON

Thomas Edison tested 1600+ materials for filament before he finally figured out what to use: carbonized bamboo.

# R

**RELATIONSHIP** : We'll get to know you on a deeper level in order to understand your dreams and ambitions. This helps us identify your long-term goals and objectives.

### ABRAHAM LINCOLN

Lincoln once owed \$1,000 in back payments and without modern bankruptcy laws, Lincoln lost his only remaining assets. Lincoln continued paying off his debts until well into the 1840's.

**INSPIRE** : Instead of allowing money to define your existence, we want to help you view your wealth as a means of getting what you truly want from life.

### DONALD TRUMP

During the late 80's Trump's Manhattan property development business went bankrupt.

# C

**COMPOSE A PLAN** : We'll help you compose a plan that guides you in your mission, and we'll continually update your plan to keep it in line with your goals.

# H

**HOLD ACCOUNTABLE** : We want you to hold us accountable when it comes to helping you reach your goals. And, in turn, we'll hold you accountable for following your plan.

### MICHAEL JORDAN

Michael Jordan was dropped from his high school basketball team. Decades later, he is part of a household brand worth over \$650 million.



### SHOTS MISSED



People who set and reach their goals possess a tenacity that has enabled them to define their own lives. They view their wealth and financial stability as having less to do with a balance sheet – and more to do with a balanced life. **THIS IS OUR PROCESS IN ACTION:**

## Wealth Designed. Life Defined.®

Sources: Darren Hardy, Living Your Best Year Ever, 2013  
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