

WHAT IS THE ROADMAP?



Our financial roadmap is an individualized plan beginning with the end, your retirement, in mind. It asks the following questions:



Where do you want this road to end?



Where should it take you through the different phases of your life and career?



How long is the road?





INTRODUCTION



You know real estate.

You know how to:

- Attract new business
- Artfully negotiate
- Get transactions closed

We know you can bring home the bacon. But do you turn this hard work into personal wealth? We're here to do just that!





COMPLETING THE MAP



- 1 Set up a business plan and budget
- 2 Set up appropriate business entity structure
- 3 Choose the correct financial planner
- 4 Set up an appropriate retirement plan
- 5 Set up investment structure and diversified investment portfolio
- 6 Run your business with the end in mind so it is ready to sell when you are ready



FINANCIAL POLL

- ☐ Do you have a will?
- ☐ Do you have an estate plan?
- ☐ Pay for your child to attend college?
- ☐ Have a plan to assist an elderly parent?
- ☐ Have a retirement date?
- ☐ Have a potential second career?
- ☐ Lining up assets you need to retire?



ENTREPRENEUR MINDSET

As an entrepreneur, you enjoy the thrill of being your own boss.

Despite that, do you spend **more time planning a vacation than planning for your business?** Don't worry, most people do!

It's time to create a business/life plan

With you running your business rather than your business running you!

Develop your personal wealth plan

Learn how to develop a roadmap to build the type of business that supports the development of your personal wealth plan. It's not about hiding money under the mattress for a rainy day. Or like my grandmother, rolling up wads of cash and storing it in her unmentionables drawer!



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FinancialRE 360



TRUSTED ADVISORS



As an entrepreneur, you are used to doing everything yourself. That may not be the right way of thinking. Instead, think of leveraging other people's talents to help you focus on the business activities that matter.

Who should be in your Trusted Advisor Circle?

Attorney

Financial Planners

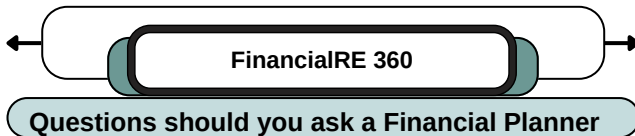
CPAs

Lenders

Mentors

Insurance Brokers





Factor 1:

What Certifications and Licenses do they have?

- Series 7? 9? 11?
- Certified Financial Planner (CFP)

Factor 2:

What Are Their Affiliations?

- Are they part of a nationally recognized financial management company?
- If not, what other connections do they have?

Factor 3:

What Is Their Business Model?

- How do they make their money?
- Does this fit your model?

Factor 4:

What Software and Tools Do They Use?

- What software do they use?
- Go through an example financial model.

Factor 5: The Interview

Questions to Ask:

- What type of clients do you work with?
- What will our relationship look like, how often will we connect?
- When will you switch my portfolio from mutual funds to individual securities?
- How do you help me make investments that are right for me?
- What steps do you take to help me stay on track to achieve my goals?

Remember, these 5 Factors save you from two outcomes:

- Choose someone just because you like them.
- Choose someone just because they are like you.





Fiscal Fitness

Your Roadmap to Financial Health



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For Support and Discussions

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