MONEY MASTERY

Comprehensive Financial Services For Inner Peace and Outer Security
To Free Up Time, Energy, Concern and Resources for Your Life's Goals

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ONE STOP SERVICES FOR INDIVIDUALS, FAMILIES, AND THEIR BUSINESSES

- ✓ For the Whole Person=s Financial Picture
  (comprehensive holistic, symbiotically interrelated services)
- ✓ An Array of Interrelated Services for Interconnected Personal Needs
- ✓ Provided for under an Umbrella Seamless Services & Educational/Informational Formats
- ✓ Cohesive, systematized and automated wherever possible to reduce personal attention needed and increase efficiency, including built in triggers to adjust procedures when benchmarks reached.
- ✓ Periodic Reviews and Double Checks and Cross Checks to assure accuracy & effectiveness
- ✓ Fee based to avoid conflict of interest on selling commission based deals

A FINANCIAL SERVICES TEAM: From Counselors to Coaches, From CPAs to Brokers

1. Life/Work Planning -

    Personal Goals and Professional Objectives: where are you now, where do you want to be in one, five, ten years, what will bridge these back to present.
    Recreational and Leisure Financial Planning: i.e. recreational joint ownership
    (Mission, Vision, Career, Consulting & Relationship, Money Issues Counseling)

2. Tax Planning -

    Lowering Exposure Strategies: Tax shelters, Deferred Taxes,
    Deduction Optimization Strategies
    Legal, Corporate-structuring strategies
    Pension Planning, Estate Planning
    (Tax Preparation)

3. Risk Management - Insurance

    Medical Coverage - Individual, Family, Group
    Disability & life insurance
    Property, Casualty, and Cash Reserves
    Professional Insurance - Errors and Omissions, Malpractice...\
    Group Insurance Plans for Business & Professional Groups
    (Insurance Brokering)

4. Cash Flow and Budget Planning,

    Savings and Reserves

Retirement
Children=s Education
Recreation
Monthly, Quarterly Integrated Reporting
(Bookkeeping, Accounting)

5. Debt/Capital Strategies and Management
Mortgage & Home Equity Planning
Recreational Ownership Planning
Lease Strategies
Business Strategic Partnerships & debt financing
(Attorneys, and Lending Institution Referral Contacts)

6. Investment Planning (low maintenance high yield)
Meeting Life/Work Goals
Optimizing Risk Return Aligned with Financial Goals
Diversified Portfolio for income, retirement, security, deferring taxes, children's educ. ...
Recreational Home Investments with management rental
(Investment Broker, Third Party Administrator for Pension Plan and
Property Management Referrals for Rental and Commercial Lease Income)

7. Estate/Legacy Planning
Coordinated with Life/Work Goals and Tax Planning
APlan Retirement as if going to live for ever and your estate as if could die tomorrow
Living wills to living trusts
(Estate Planning Legal Services)

8. Entrepreneurial Services For:
Business Owners, Professional Groups, Ancillary business income for provision of products and services to own business, Part time and Home Businesses, Executive Intra-preneurs, Start-up and Launch Financial systems, Value added to Re-inventing business consulting

Corporate and Small Business Financial Planning
Legal structuring for risk exposure, liability, and tax benefits
Employee Benefits
- Group Insurance
- Preventative Health and Well-being Programs

Pension Plans
Cafeteria Plans (benefitting employer with lowered payroll taxes & employees with pre-taxed income, i.e. childcare, health...)
Profit Sharing

(Corporate and Intellectual Property Attorneys)
(Business Plans Developers, PPOs, Going Public, Mergers & Acquisition Strategists)

We utilize an array scientific methodologies, success proven game plans. We have the charts and graphs to help compare options and tailor choices to specific goals. We are not in the broker driven hype. It=s not the next 1,000 points that matters, its the next 10,000.

MONEY MASTERY PROGRAM

1. COHESIVE AND COMPREHENSIVE PROFESSIONAL (CONSULTING) SERVICES
    - Financial Advisor Roles
        - Money (Issues) Counselor
        - Financial Advisor And Strategist
        - Monetary Navigator
        - Fiscal Coach
        - Wealth Manager (Asset Goals Are as Uniquely Individual as They Are Varied)
    - Mission, Vision, Career, Consulting & Relationship, Money Issues Counselor
    - CPA &/or Tax Preparation
    - Insurance Broker
    - Bookkeeping, Accounting
    - Attorneys, and Lending Institution Referral Contacts
    - Investment Broker
    - Third Party Administrator for Pension Plan
    - Property Management Referrals for Rental and Commercial Lease Income
    - Estate Planning Legal Services
    - Corporate and Intellectual Property Attorneys
    - Business Plans, PPOs, Going Public, Mergers & Acquisition Strategists

2. PROGRAMS FOR GOAL ACHIEVEMENT
    - Financial Strategic Development
    - Life/Work Goals Consulting
    - Money and Success Issues Counseling

3. PERSONAL COACHING

4. INFORMATIVE LECTURES, EDUCATIONAL SEMINARS, AND EXPERIENTIAL WORKSHOPS

5. FINANCIAL SUPPORT GROUP PROGRAM
    - Money Issues Integration Group

MONEY MASTERIES - PERSONAL CFO PROGRAM
Informing, Clarifying, Strategizing and Implementing

The Personal Chief Financial Officer System and Money Management Team Roles
Whose goal is to facilitate you reaching yours by freeing up resources: time, money, concern and creative energy

MONEY (ISSUES) COUNSELOR
Are there any issues around money that could sub-consciously be getting in your way?
Life/work counseling to support optimizing resources to achieve goals
Are you aligned left and right brain for single minded success?
Issue resolution that Aheals the cause@ of problems as they impact goals

FINANCIAL ADVISOR AND STRATEGIST - The Strategic Plan and Tactical Implementation
Creating a coordinate, cohesive plan for all aspects of life including,
Optimal Methods to achieve goals given shifting priorities and circumstances.
Look at the big picture - short and long term, family and career, business and recreation.
Dreams, Aspirations, Goals & Objectives for all aspects of life that finances affect, i.e.:
Professional Development, Business Development, Recreation, Retirement, Family Health, Education, Well-being and Security
More than a product oriented event this is a process, a relationship of: professional performance, collegial trust and friendship

MONETARY NAVIGATOR
Monitoring For Cohesive Effectiveness of Plan=s Implementation
Designing Automated Systems with Feedback Mechanisms and Adjustment Triggers
Correcting the course with changing financial goals, personal needs, and environment

FISCAL COACH
Your personal coach to support commitments, Encourage you, and tell you the truth
Help keep you centered, focused and accountable to your goals
Agreements to support living a full-potential and yet balanced life.
Provide supplemental training and timely assistance as requested

WEALTH MANAGER (Asset Goals Are as Uniquely Individual as They Are Varied)
Your criteria for wealth are utilized in realization of a maturing financial plan
Prosperous and balanced life
Stewarding wealth wisely
Philanthropic Giving, Religious Tithing, ... Not by bread alone, but by ...
Funding personally inaugurated community & humanitarian programs
Legacy - biological and the global family
Dealing with wealth and success issues
Money doesn’t make a person, a person makes the money.