

# THE PRESERVATION PROGRAM™

Built to drive clarity and integrate all areas of planning for Accomplished Entrepreneurs



1

## THE VALUE DISCUSSION

The introduction of how our boutique firm can enhance your situation and how we make a difference

2

## THE DOS CONVERSATION

A discussion to guide direction regarding your Dangers, Opportunities and Strengths

3

## THE ENGAGEMENT DECISION

The decision of how to engage our firm

4

## THE DISCOVERY INSIGHT MEETING

The discussion to establish **clarity** on your vision, values and goals

5

## THE DISCOVERY PROFILE REPORT

A documented report of your vision, values and goals to guide the implementation of your plan

6

## THE PLANNING MAP

A focused plan of action items resulting in **decisions** to align your planning solutions to your vision, values and goals

7

## THE DISCLOSURE PROCESS

The collection of details and information regarding current products & strategies

8

## THE INTEGRATED WEALTH PLAN

An integrated view of your financial independence, family legacy as well as social capital legacy

9

## THE IMPLEMENTATION PROCESS

The management of actions to improve your financial well being and achieve desired **results**

10

## THE PROGRESS REPORT

The review of progress of current strategies and future action items to maintain **confidence** in your plan