

# 7 Lessons

from Ironman Triathlons to make your wealth and life success easier

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- 1 Make crazy ideas possible**  
Create a goal, number and a plan – and stick with it.
- 2 Make it easy**  
Use design-thinking to make it hard to fail.
- 3 Challenge limiting beliefs**  
Pace yourself to avoid gas-pedal risk.
- 4 Learn and be flexible**  
Breakthroughs and setbacks are normal.
- 5 Admit & commit**  
Use a coach to refine goals and get an A-level plan.
- 6 Dig deep, execute and appreciate**  
When things get tough.
- 7 Life = moments**  
Make it fun, celebrate big and small wins.



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# Wealth & Life Tips

to help you go the distance

1

## Define your goals

Make sure your life goals drive your financial plan and investment strategy.

2

## Get a plan

Address all aspects of your financial life.

### Financial Independence:

Determine your “make work optional” number, stress-test the plan, save, invest strategically, adapt, spend sustainably.

### Tax Planning:

Reduce taxes via tax-efficient investing and smart asset structuring, plus yearly tax recognition strategies.

### Specialized Planning & Advice:

Assess non-portfolio wealth drivers relative to plan: Business liquidity goals vs. life goals, real estate investment property tradeoffs, college funding, special opportunities as they arise.

### Estate Planning:

Maximize tax-smart intergenerational wealth transfer and legacy with trusts, wills, powers of attorney, health care directives.

### Risk Management:

Analyze risk gaps. Insure against catastrophic risks to protect assets and income. For example, increase umbrella coverage if you have teens, boats, properties.

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## Find a coach

A fee-only fiduciary financial advisor can help you. Seek an objective partner that follows the highest level of standards to guide you.

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