

8 Essentials

8 Ironman & Financial Ironman Essentials

- 1 **Personal business vs. biz-business**
- 2 **Make crazy ideas possible**
- 3 **Challenge limiting beliefs**
- 4 **Admit & commit**
- 5 **Make it easy – Expert guidance & process**
- 6 **Measure, learn, adjust**
- 7 **Identify & overcome obstacles**
- 8 **Live more now**



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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.

3

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.

Celebrating over 20 years of life-changing financial advice

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