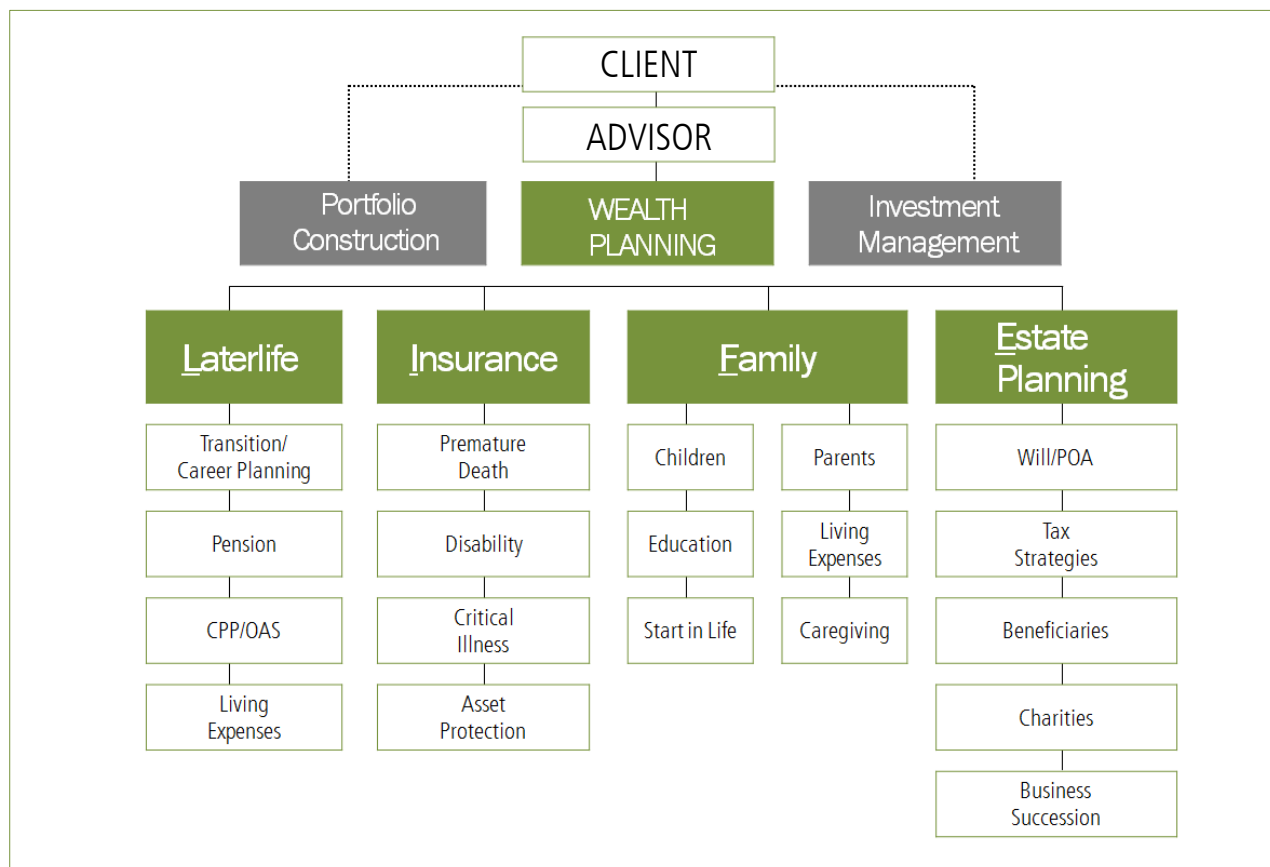


# Wealth Planning for LIFE

This chart can be used as a visual aid to help you explain to clients what a holistic wealth plan looks like and how your services can be utilized to support their planning needs – now and in the future.



Here we show the four main components of wealth planning, with each component representing a different facet of a client's life. Listed under each category is a set of possible planning needs you can explore with clients, based on what is important and relevant to them.

When working directly with clients, use the full-sized landscape LIFE chart on the next page.

