

# 360 LifeMap Strategies



clarify vision & future	harmonize work & life	create financial comfort	help & protect family	build a legacy
<b>plan for the future</b> financial planning retirement income estate planning	<b>meet basic needs</b> income planning expense/budgeting social security corporate benefits	<b>simplify finances</b> investment & savings home & assets business succession	<b>help children</b> savings loans & gifting special needs learning about money	<b>execute intentions</b> wills & trusts POAs medical directives protect heirs
<b>ease life's transitions</b> marriage/divorce birth/death leaving my home career & profession	<b>enhance lifestyle</b> vacation home family trips & events hobbies & leisure lease v. buy	<b>reduce taxes</b> harvesting asset location restricted stock stock options	<b>assist parents</b> long-term care eldercare counseling medical & estate needs	<b>help beneficiaries</b> designations trusts & trustees valuation/projections
<b>live my values</b> clarify my mission give to community volunteer my time	<b>manage health</b> medicare/supplemental long-term care wellness & nutrition	<b>protect assets</b> insurance corps/partnerships buy-sells defined benefit plans	<b>fund education</b> savings pre-paid tuition loans/grants/scholarships	<b>give to charities</b> planning & strategies low-basis investments tax-advantaged gifts

Depending on your goals, needs and unique situation, the insights and expertise of the following professionals may be required:

- Actuary
- Attorney
- Certified Public Accountant (CPA)
- Estate Attorney
- Fiduciary
- Geriatric Care Manager
- Insurance Broker (LHDLTC)  
Life, Health, Disability, and Long-term Care
- Insurance Broker (P&C)  
Property & Casualty
- Mortgage Broker
- Philanthropic Consultant
- Private Banker
- Real Estate Broker