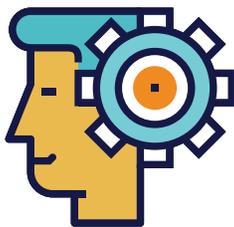


# 5 BENEFITS OF A SIGNATURE LIFE PLAN



## 1 YOU'LL HAVE A REALISTIC VIEW OF YOUR CURRENT SITUATION.

A Signature Life Plan starts with what we call a "Reality Check."



You'll take an inventory of the current state of the **four primary areas of your financial life** –

what you **have**



what you **owe**



what you **make**



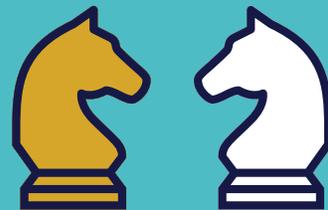
what you **spend**



This information serves as the starting point for your plan and – don't worry – the journey of a thousand miles begins with the first step and this is it!

## 2 YOU'LL HAVE A CLEAR VISION OF YOUR IDEAL LIFE.

We will walk you through a process of self-discovery that helps you outline what's important to you.



This will help you crystalize

**who**  
you want to be



**what**  
you want to do



**where**  
you'll do it



**with whom** (if anyone)  
you'll do it with



This step isn't about money, it's about the type of life you want your money to provide.

3

YOU'LL KNOW WHAT IT TAKES.



After we've walked through the **Reality Check** and **Defined Your Signature Life**, you'll have the tools to be able to determine what you have to do to **"BRIDGE THE GAP"** between where you are right now and the life that you really want.

4

YOU'LL HAVE A ROADMAP THAT CAN SERVE AS A BAROMETER FOR MAKING DECISIONS.



Should you buy a new car or drive the one you have for one more year?

Should you rent or own your vacation home?



When you have an understanding of both your current situation and the life you want (along with your numbers), it's much easier to make the financial decisions that you face on a daily basis.

5

YOU'LL HAVE STRATEGIES TO HELP YOU BUILD THE LIFE YOU WANT!



As part of developing your Signature Life Plan with you, we'll share strategies that you can use to:

make saving automatic, evaluate your expenses periodically to reduce your spending (on things you may not need,) and many other tips for keeping your plan on track. We'll also offer you customized suggestions and insights designed to move you forward toward your Signature Life.



**THE BOTTOM LINE**

**Building a Signature Life** for yourself goes beyond just putting money away in a company-sponsored retirement plan. At **Signature Wealth Strategies**, our dedicated team is here to help you take the steps toward reaching your goals.

