

SIGNATURE WORKSHOP

The Coordination GapTM

Most planning failures are not caused by bad advice. They happen when good decisions stop working together.

FAMILY. FINANCES. FUTURE.

THE CORE IDEA

Most Families Don't Have A Bad Plan. They Hav

A will here. An advisor there. A trust that was never funded. Each decision was reasonable on its own — but no one is responsible for making sure they still work together.

THE PLAYERS

Four Advisors. One Family. No Coordination.



WHERE GAPS APPEAR

The Problem Most Families Never See Coming

Coordination breaks down in predictable places. Each is small on its own — together they undo years of good planning.

- Beneficiaries that contradict the will
- Trusts that were created but never funded
- Powers of attorney that are missing or outdated
- Advisors who have never spoken to each other

REAL CLIENT STORY

“We Thought Everything Was Done.”

A retired couple had every document in place — and still had outdated beneficiaries, an unfunded trust, and no coordinated plan. Coordination, not more documents, is what finally gave them clarity.

START WITH CLARITY

The Estate Score™

A short, structured assessment that shows a family exactly where their pieces are — and are not — working together. The fastest way to make the Coordination Gap™ visible.

- Takes minutes
- Personalized result
- A clear next step

DISCUSSION

Questions

What pieces of your own plan have never been reviewed together? Where might a gap be hiding right now?

THE NEXT STEP

A Private Review

A calm, confidential conversation to see how your estate, tax, financial, and family decisions fit together — and where coordination is missing.

- No products. No pressure.
- A coordinated view of your plan
- Schedule at your convenience