

COMMUNITY WORKSHOP

Family. Finances. Future.

Every important decision eventually affects all three. This workshop helps families see how they connect.

FAMILY. FINANCES. FUTURE.

THE FRAMEWORK

Three Things Every Decision Touches

Behind every major life decision are the same three threads. When they move together, families find peace of mind.

- Family — relationships, communication, care
- Finances — assets, income, protection
- Future — legacy, continuity, peace of mind

FAMILY

It Starts With People

The most important plans are the ones the whole family understands. Clear roles and honest conversations prevent confusion later.

Order Brings Confidence

When accounts, beneficiaries, and documents are organized and aligned, decisions become simpler — and far less stressful for everyone.

FUTURE

Continuity Is The Goal

A good plan doesn't end with you. It carries your intentions forward, smoothly and without surprises, to the people you love.

START WITH CLARITY

The Estate Score™

See where your Family, Finances, and Future are aligned — and where they are not — in just a few minutes.

DISCUSSION

Questions

Open the floor. What questions do you have about your own plan?

THE NEXT STEP

A Private Review

When you're ready, we'll help you bring all three together into one coordinated plan.

- Confidential
- Coordinated
- No pressure