

# The Family Wealth Circle™

A Comprehensive Life Management System For Families Who Want to Enjoy Confidence and Comfort For All Their Financial Affairs.

Platinum  
Service Package

Values Oriented

**Make Wise Decisions  
About Your Money**

The Discovery Process™

Establishing Your  
Milestones™

Regular Review &  
Continued Education

Taking a Snapshot

Implement Master Plan

The Financial  
Independence Roadmap

Legacy and Insurance

Comprehensive  
Assessment

The Investment  
Policy Statement

Develop Your  
Personalized Master Plan

The Tax MiniMiser™