



leap® WEBSITE CONTENT

We all seek a financial life that produces long term wealth, security and income. If this could be done while reducing risk, wealth erosion and financial costs, then all the better. Getting organized around this powerful desire is more difficult than it may appear. Life doesn't occur in a vacuum and our financial decisions shouldn't be made in one as well.

Every one of us makes financial decisions throughout our life at different times, with different people, all under different circumstances. This typically leads to feeling confused, unorganized, and not sure if we've made the right decision for us or our family. Every decision we make has an impact on other decisions in ways that are not always apparent. Understanding the basics of how money works is critical to moving ahead with confidence.

We must start then by evaluating the challenges that threaten our financial potential and how best to overcome them. Without a complete view of how all of the elements of our financial choices work together, we may end up losing our wealth unnecessarily, taking on greater risk and falling short of reaching our full financial potential.

So how do we help you improve your results?

We start by looking at the relationship between every money decision, discover where we are today and envision where we may be headed in the future. Our Rulebook, powered by an innovative personal financial model, creates the foundation for success. The Leap Model® focuses on the five critical components of personal finance - Protection, Savings, Growth, Cash Flow and Debt. This model offers an unbiased, simplified approach to visualizing the impact, positive or negative, of our money decisions. This comprehensive tool highlights your entire financial situation so that it may be organized, analyzed and tracked for optimal performance.

Through a combination of hands-on materials and innovative software, your financial professional can help you calculate every move and keep you connected every step of the way. Through our carefully designed, collaborative process, your money becomes more productive and efficient. The intended results are clear: enhanced protection, proper savings, more efficient growth and the ultimate enjoyment of your wealth.