The Benefits of the Leap Model™

The Leap Model of your Present Financial Position™ is constructed based on the financial information you provided during the second phase of the Leap Strategic Process™, described as Identify, during which time you organize all your financial information. You should check all the data on the Model to make sure that you agree with this information before proceeding with the analysis process.

The Leap Model represents a financial laboratory, wherein an analysis of the efficiency and effectiveness of your assets will be measured and evaluated. The accuracy of the information you have provided is critical to the veracity of the strategy functions. At anytime during the process, you may change the data to meet your needs, wants or desires.

The Protection Component represents those parts of your financial life that protect your assets, income, and economic life value from a variety of risks. These risks include: accidents, fire, theft, illness, disability, lawsuit, death, taxes, and inflation.

The Savings and Growth Components represent your assets and illustrate them in a hierarchical fashion in order to show their relative rate-of-return, liquidity, and risk. The assets are also positioned in a defined structure that illustrates their important use and benefit features.

The Debt Window reveals any liabilities such as personal debts, mortgages or loans. It shows the type of loan, the monthly payment, the relative interest rates, and the number of months until the loan will be paid.

The purpose of the entire Leap Model is to examine your current financial position according to its internal, external and coordination designs.

Once you understand the Leap Model and how it works, we believe you will appreciate all that it provides in helping you to achieve your financial needs, goals and desires.

Master Present Position

leap®

Date ______________________

Last Name

____

First Name Age

Client

____

Spouse

____

Child

____

Child

____

Child

____

Child

____

Occupation

Client

____

Spouse

____

Client Income $ ______________________

Spouse Income $ ______________________

Total Income $ ______________________

% of Income Saved ______________________ %

Total Assets $ ______________________

Additional Information:

Debt

Debt Type	Rate	Months Left	Monthly Payment	Unpaid Balance
Total				

Notes:

Vehicle Insurance	Property Insurance	Liability Insurance
Disability Insurance	Medical Insurance	Government Plans
Wills & Documents	Trusts & Ownership	Life Insurance

WCA/Checking	Savings	Credit Union
Savings Bonds	Certificates	Money Market
Tax Deferred	Tax Free	Tax Deductible

Government Bonds	Corporate Bonds	Municipal Bonds
Preferred Stocks	Blue Chip Stocks	Growth Securities
Collectibles	Real Estate	Business/Shelters