

Additional Information

Debt Type	Rate	Months Left	Monthly Payment	Unpaid Balance
Total				

Government Bonds	Corporate Bonds	Municipal Bonds
Preferred Stocks	Bluechip Stocks	Growth Sector
Collectibles	Real Estate	Business/Shelters

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 Cash Flow Component shows the current funding of financial products within your Present Financial Position. Amounts shown are annualized and the direction of the flow of the money reflect whether the money is New Money flowing into the Leap Model, cash withdrawals, or income received, whether in the form of earned interest, dividends, rent, or other forms of cash flow coming from financial products or services from within your Present Financial Position.

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.