

THE BUSINESS OWNER'S DILEMMA:

ADDRESSING THE THREE BIGGEST DILEMMAS AT THE INTERSECTION OF WEALTH AND LIFE PLANNING

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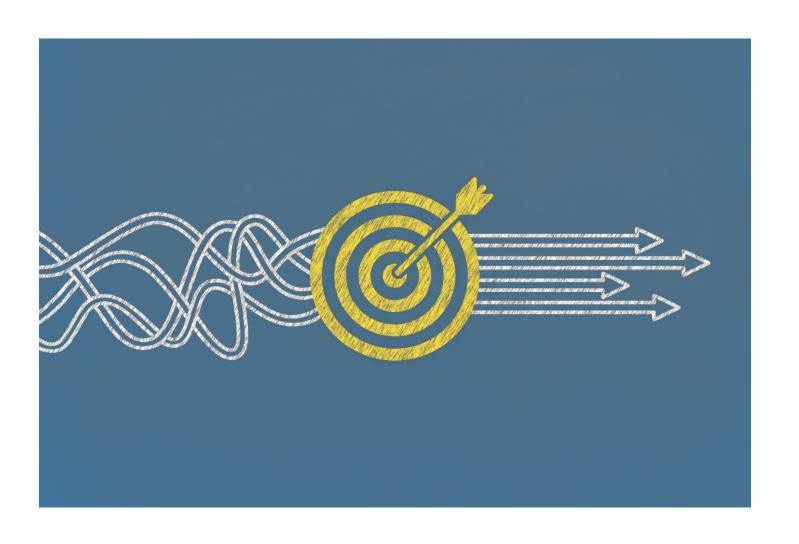


Too Many Entrepreneurs Aren't Enjoying The Success They've Earned.



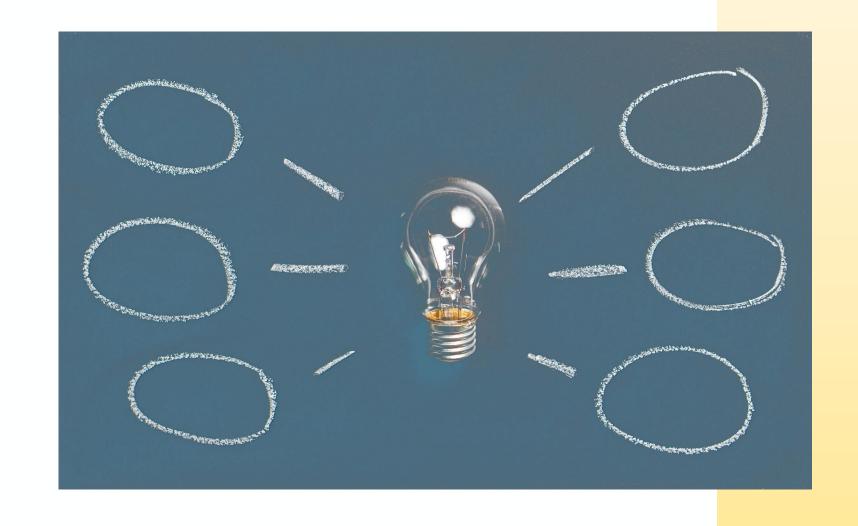


My Why



Goals For Today

What You Will Learn





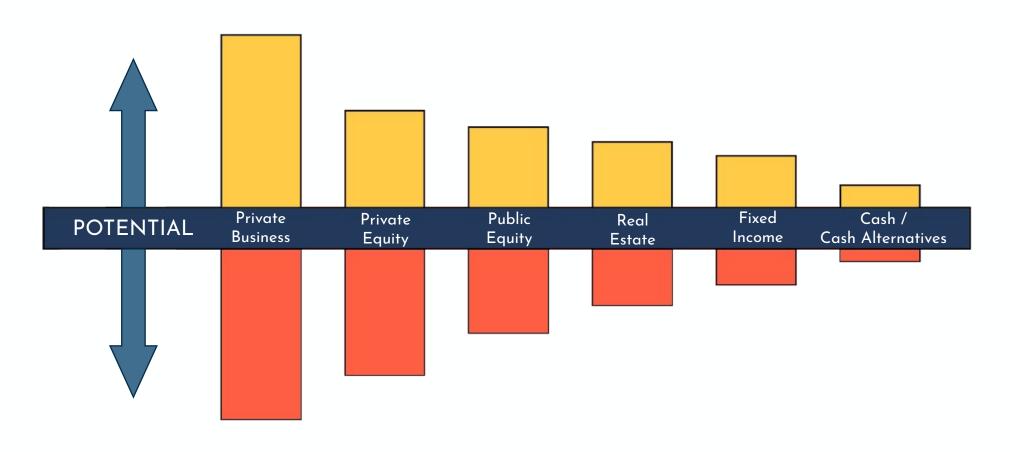
Why Is It So Different For Entrepreneurs?



Control vs. Risk



The Entrepreneur's Investment Opportunity Diagram



The Paradigm Of Money



What is your earliest memory of money?



What emotions are tied to it?

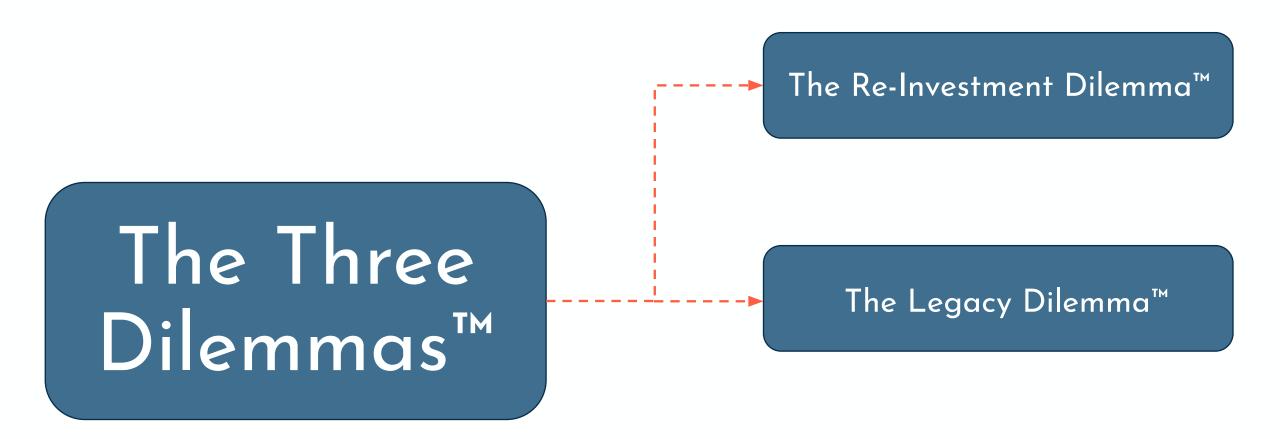


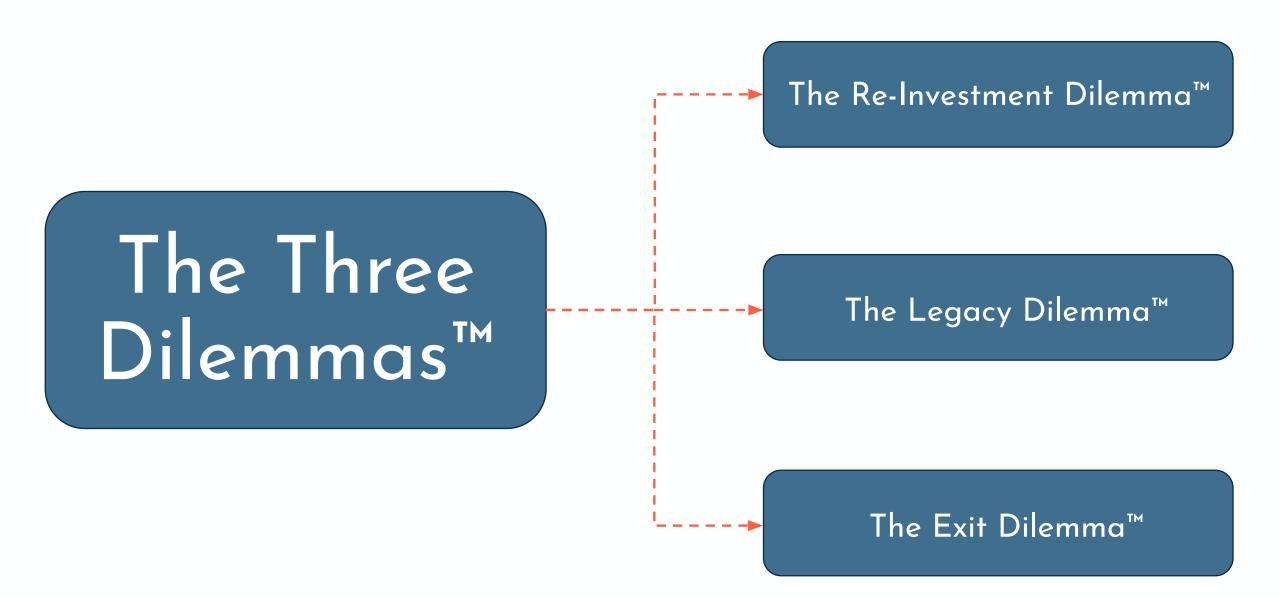
How do you think this affects your decisions today?

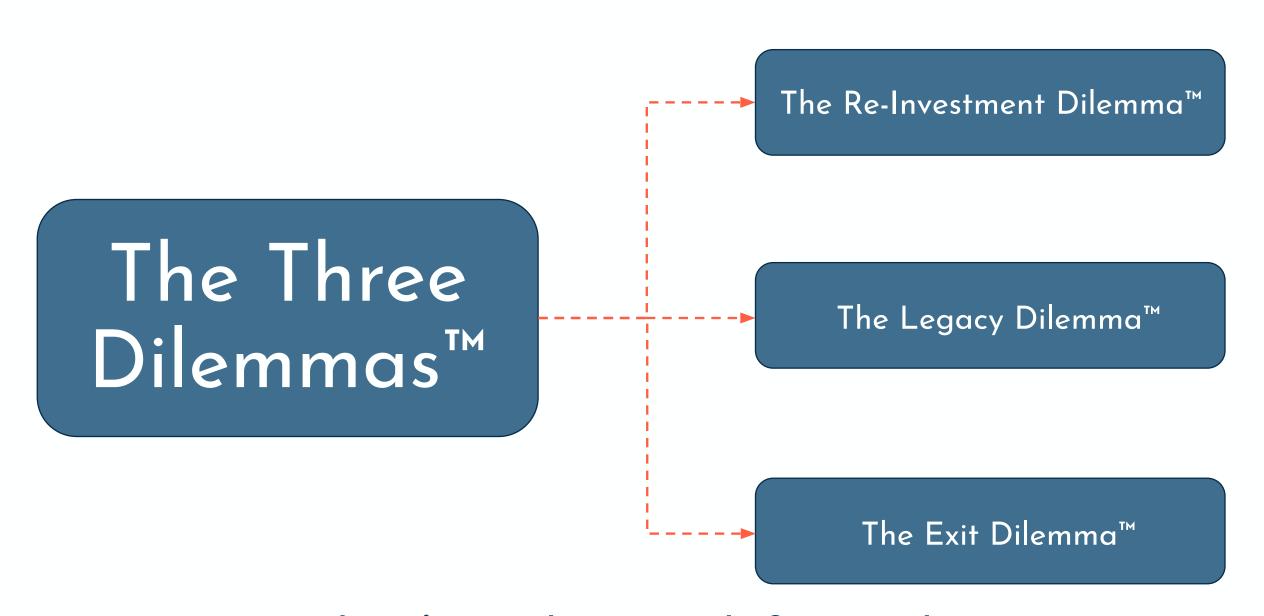
The Three Dilemmas™

The Re-Investment Dilemma™

The Three Dilemmas™



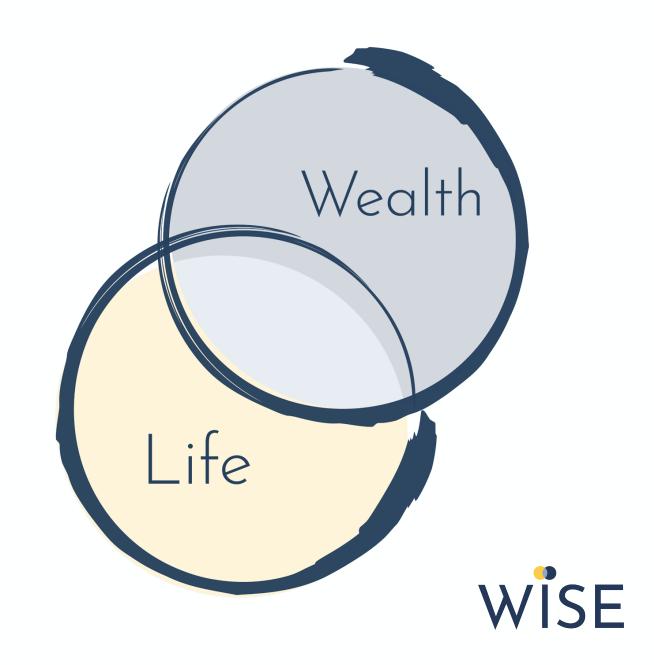




What is my best path forward?

How Do I Bring It All Together?



















Free Resource

Take the WISE™ Assessment:

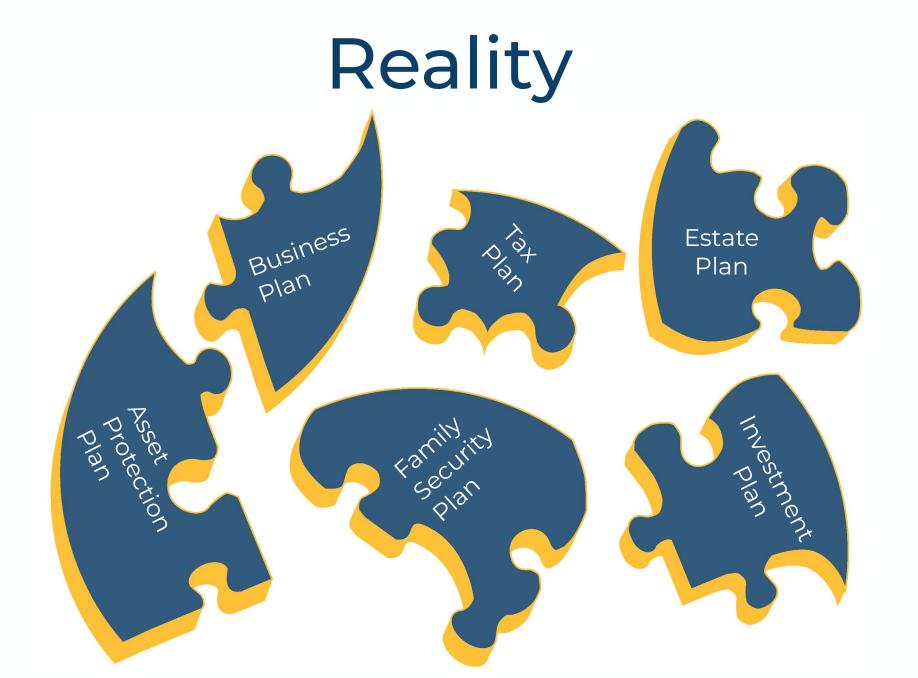


Integration

Business Plan

Investment Plan **Estate** Plan

Tax Plan Family Security Plan Asset
Protection
Plan



Bringing It All Together



Bringing It All Together



Return on Investment vs Return on Life Experience™

What Is The Life Experience You Desire?



What is most important to you in life?



What is important to you about money?



What do you want your time to look like?

What Is The Life Experience You Desire?



What is most important to you in life?



What is important to you about money?



What do you want your time to look like?

RATE YOUR CURRENT RETURN ON LIFE EXPERIENCE™
VS YOUR IDEAL RETURN ON LIFE EXPERIENCE™

Free Resources





Better Perspective. Better Decisions.

