

1) LIFESTYLE — does the financial strategy allow you to maintain your current standard of living, that you are used to, throughout retirement?

2) LIQUIDITY — does the financial strategy give you access to your money or is it tied up in an investment and your money needs to be “liquidated” before getting to it?

3) LONGEVITY — does the financial strategy allow your money to grow and be there in your later years or will you outlive your money?

4) LONG-TERM CARE — does the financial strategy give you the ability to plan ahead for one of the biggest expenses in your later years, which is medical care?

5) LEGACY — does the financial strategy give you the ability to leave a legacy benefit that supports your future generations?

6) Control — does the financial strategy expect you to give them your money and give up all control?

7) Cash Flow — does the financial strategy tie your money up in investments or real estate, or do you have access to generate a substantial amount of cash flow?

THE FIVE “L’S” & 2 “C’S”.

IF THE STRATEGY CANNOT PROVIDE ALL 7 CRITERIA, ASK YOURSELF IS IT WORTH IT.