

Financial Success Guide

Congratulations on taking the first step to financial success! If you are reading this guide, you believe in your heritage and want to do everything you can to invest in your legacy.

As you know, managing personal finances can be challenging and even overwhelming. Where do you start? What should you focus on? Are you covering all essential areas to properly care for those you love?

Take the next step to invest in your legacy by growing and protecting your personal assets with this simplified checklist.

Insure:

Prepare for setbacks to protect who and what you value

- Complete estate plan (will; power of attorney; trust)
- Acquire adequate insurance (health; life; specialty)
- Identify long-term care plan (insurance or family)
- Support Medicare enrollment (fill gaps in coverage)

"One who is wise is cautious and turns away from evil, but a fool is reckless and careless."

Invest:

Contribute to your future and provide for those you love

- Complete financial plan (cash flow; debt reduction; asset projection)
- Set up personal portfolio management (general; emergency; IRA)
- Maximize employer retirement matching (401k; 403b)
- Increase income potential with education fund (529 Plan)

"Wealth gained hastily will dwindle, but whoever gathers little by little will increase it."

Learn more or request a free consultation at: SchutteFinancial.com



Why Invest Now?

Waiting Could Cost You \$Millions

