IMPACTING YOUR LEGACY

THE IMPACT LEGACY RETIREMENT GROUP

We believe we should give our lives to
something bigger than ourselves.

www.impactingyourlegacy.com

You've worked hard all your life but you still worry if you've saved enough.

Maybe you've had these questions like so many others:

- Is my investment strategy protecting my hard-earned money?
- Does my current financial plan consider everything I really need when I am no longer working?
- How will taxes affect the money I've saved?
- Am I going to be okay when I retire?

THE IMPACT

Suite of Services

- **RETIREMENT INCOME STRATEGY**
- **INVESTMENT RISK MANAGEMENT**
- **PROACTIVE TAX PLANNING**
- **HEALTHCARE PLANNING**
- **LONG-TERM CARE SOLUTIONS**
- **ESTATE ESTATE PLANNING**
- **PHILANTHROPIC PLANNING**
- **FEE PLATFORM - FLAT RATE FEE**

Our clients are charged an easy-to-understand flat fee that is transparent and is based on the actual services provided

THE IMPACT MISSION

Own your tomorrow so that you can live better today

Remove the anxiety and uncertainty about your retirement years so that you can live the life and leave a legacy you always wanted.

THE IMPACT PROMISE

1. Eliminate Confusion
2. Create a Simple Plan
3. Enjoy Your Retirement

THE IMPACT PURPOSE

We exist to have a comprehensive service & value offering that addresses all retirement planning complexities so that you can take care of the people, causes, and dreams you care about most.

THE RETIREMENT PATH

The 5 Essentials to a Smooth Retirement Ride:

01 INCOME PLAN

02 IRA TAX PLAN

03 MARKET SAFE PLAN

04 LONG-TERM CARE PLAN

05 LOW INVESTMENT FEES

Before jumping on the road to retirement, every retiree needs to be equipped with an Income Plan. Think of the Income Plan like a new car. When car shopping, some people desire an SUV, some a sports car, for some a sedan, and for some they desire a compact car. While the vehicle choices vary in shape and size, everyone has the same desire...they want to know about the safety features. They want to know that the vehicle is going to be reliable, protect their family, and will make sure they can get to their destination. An income plan is just the same. Retirees want that income plan to be predictable and that it's going to protect their family along the way.

Once the income plan is in place, that's not going to be enough. The retiree needs the roadmap showing them how to avoid roadblocks. The Impact Legacy Retirement Group has the team and tools to avoid these roadblocks so that you can have a dream retirement.

THE 4 RETIREMENT ROADBLOCKS

ROADBLOCK 1

TAXES

Uncle Sam deserves what is rightfully his, but we help develop tax-efficient strategies that allow you to keep more of what you've earned to support your family, causes and community.

ROADBLOCK 2

MARKET RISK

We help you grow wealth wisely by building custom-tailored portfolios that are diverse, align with your preferences and reduce unnecessary risk.

ROADBLOCK 3

INVESTMENT FEES

We believe advisor fees should not be assessed based on the size of your account but based on the services and value you are receiving during retirement. Our team charges an easy-to-understand flat fee based on the actual suite of services we provide.

ROADBLOCK 4

LONG-TERM CARE

Without a plan, this can be the biggest threat facing your life's savings. We'll help you determine if a long-term care plan is right for you or if there are other options to protect you if daily assistance is one day required.

THE IMPACT CYCLE

Discovery

IDENTIFY GOALS & RETIREMENT ROADBLOCKS

a. Receive a **FREE** Retirement Income Plan
b. Receive a **FREE** Retirement Tax Analysis
c. Receive a **FREE** Market Risk Analysis
d. Receive a **FREE** Investment Fee Analysis

Solutions

PROPOSAL OF METHODS TO ADDRESS RETIREMENT ROADBLOCKS

Implementation

IMPLEMENT STRATEGIES NECESSARY TO AVOID CURRENT AND FUTURE RETIREMENT ROADBLOCKS

On-going

ANNUAL STRATEGY MEETINGS TO UPDATE AND ADDRESS INVESTMENT, TAX, & ESTATE PLAN

IMPACT
LEGACY **RETIREMENT** GROUP

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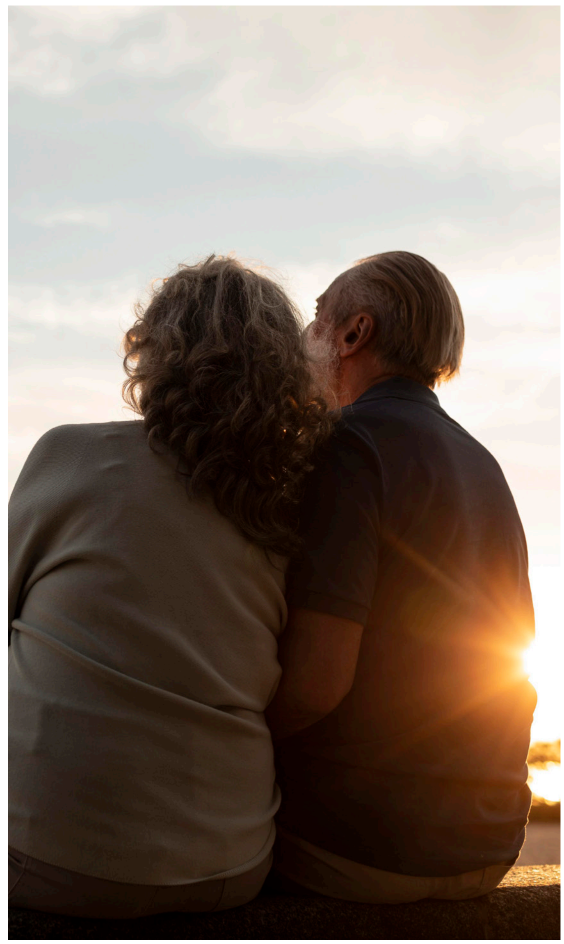

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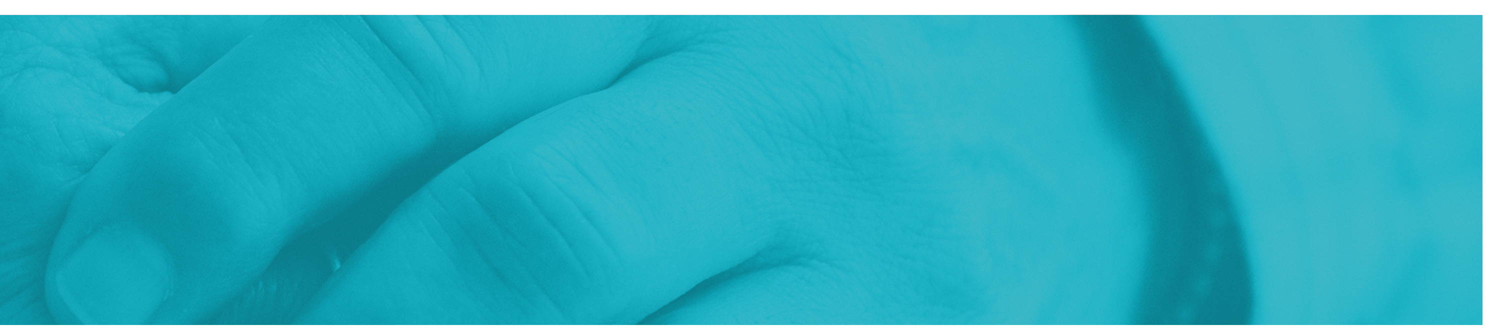

IMPACT
LEGACY **RETIREMENT** GROUP

We're here to help you feel confident in your **financial future**.

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