



MyLifePrint

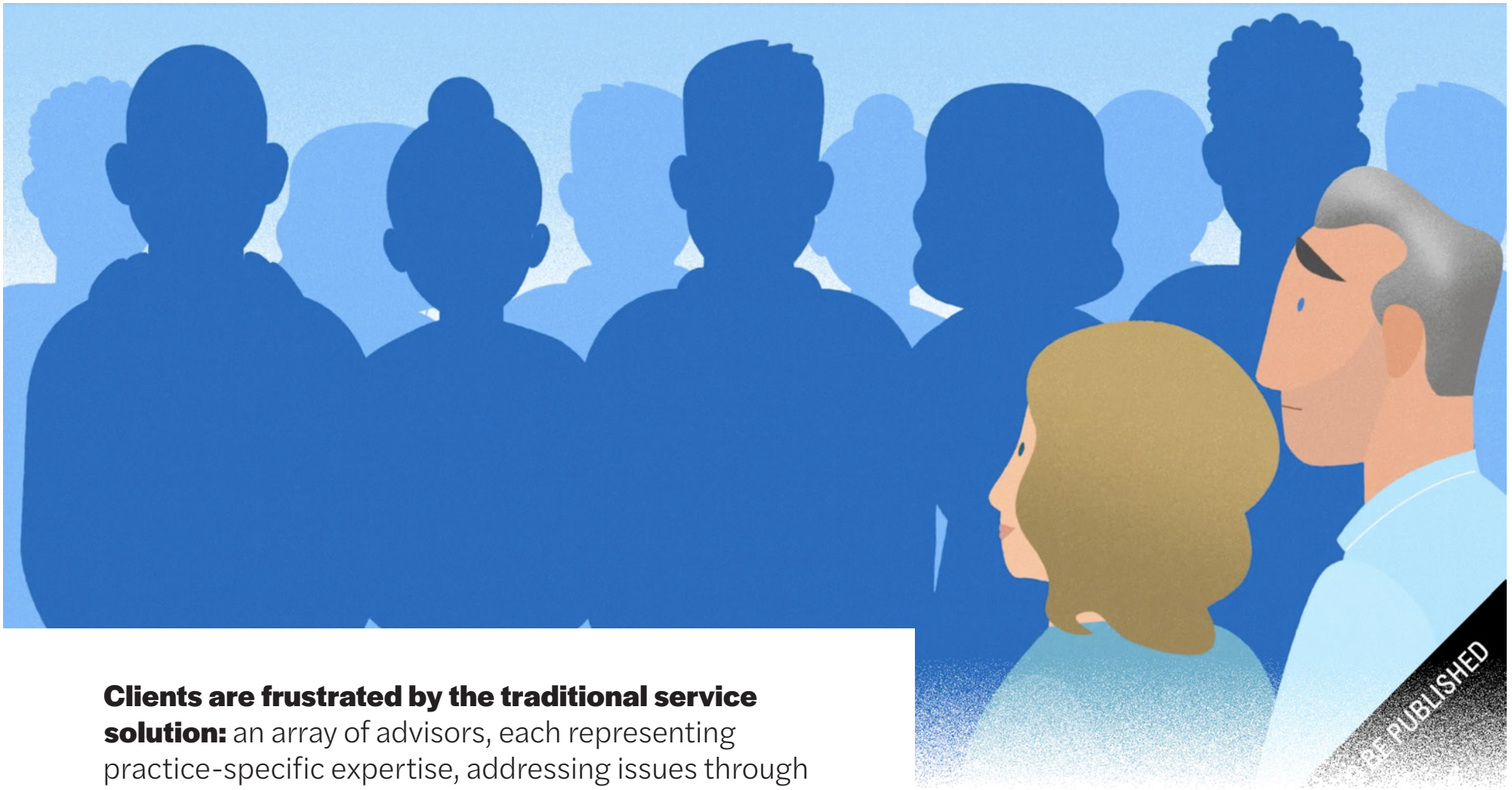
**Digitally-assisted strategic planning
and implementation toolset**





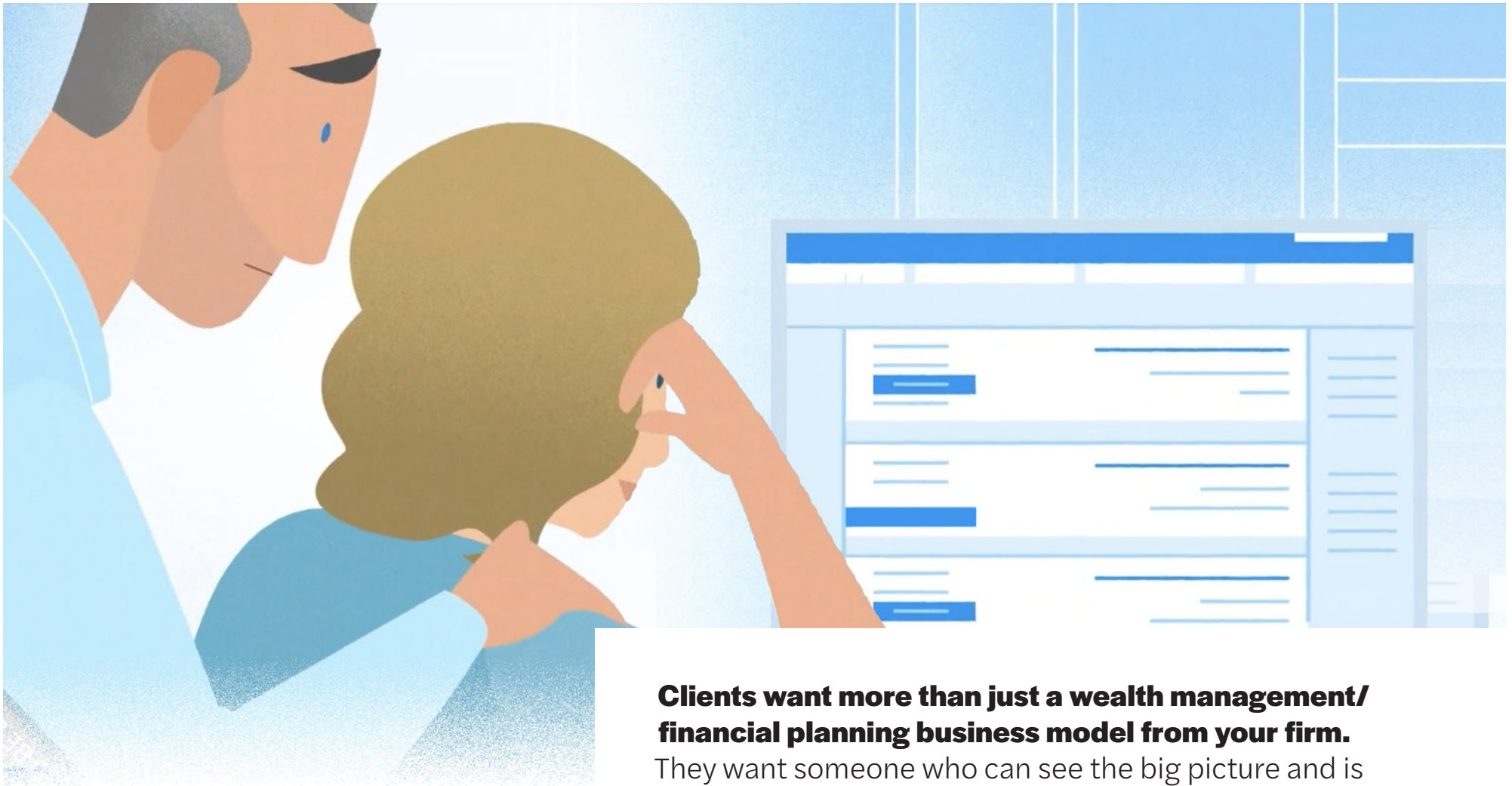
The Situation

Life is more than accumulating wealth. You know that. And your clients know that. They're looking for someone who can do more than just manage their wealth.



Clients are frustrated by the traditional service

solution: an array of advisors, each representing practice-specific expertise, addressing issues through the singular lenses of their firms' offerings. The attorney sees each issue as a legal question. The tax accountant looks at each issue for tax savings. The contractor only sees what is needed to build the house. And so on.

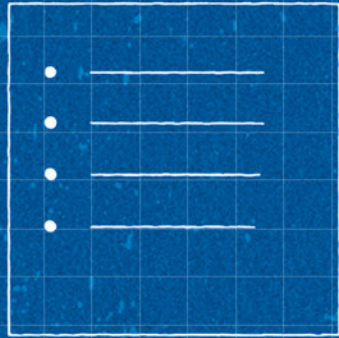


**Clients want more than just a wealth management/
financial planning business model from your firm.**

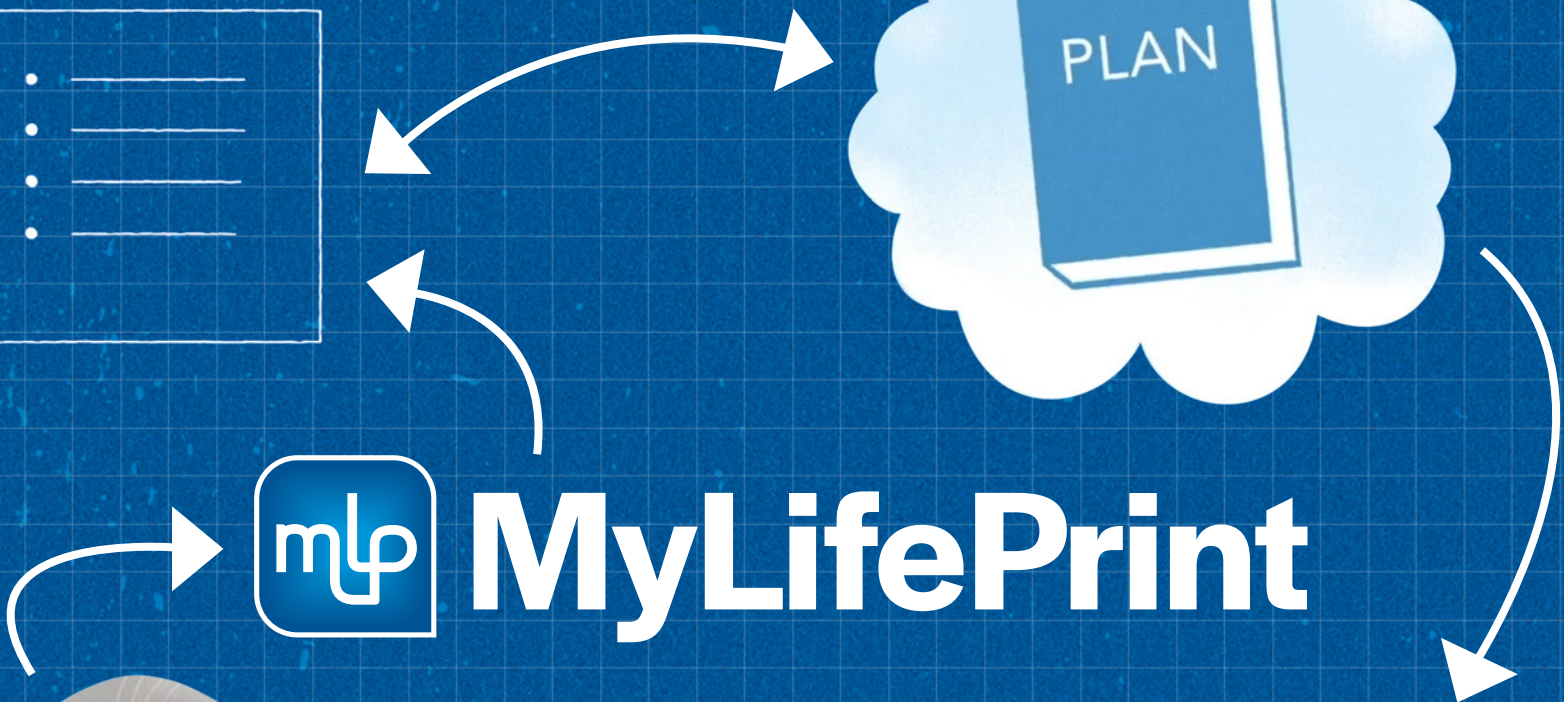
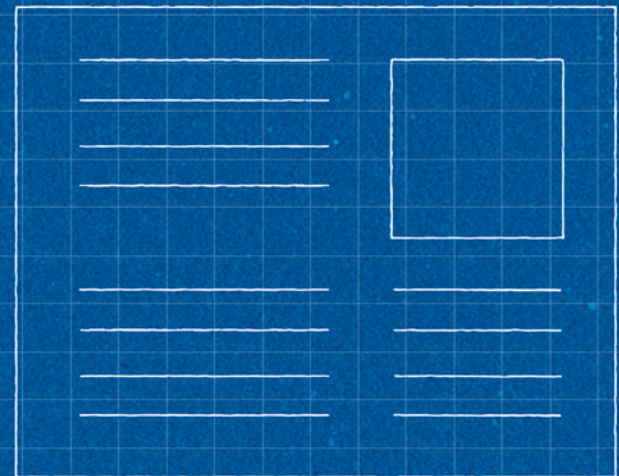
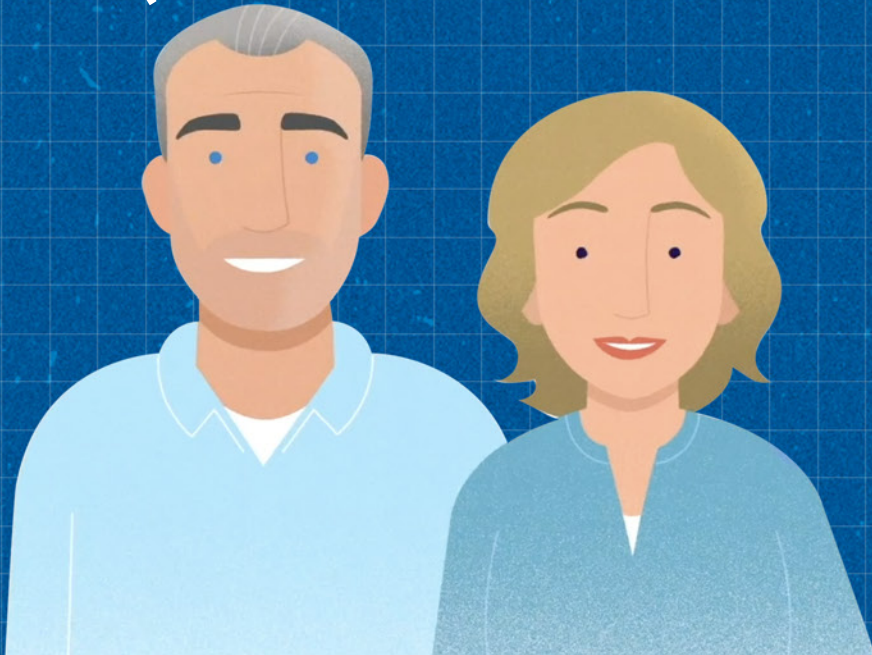
They want someone who can see the big picture and is able to address all the issues that matter to them.

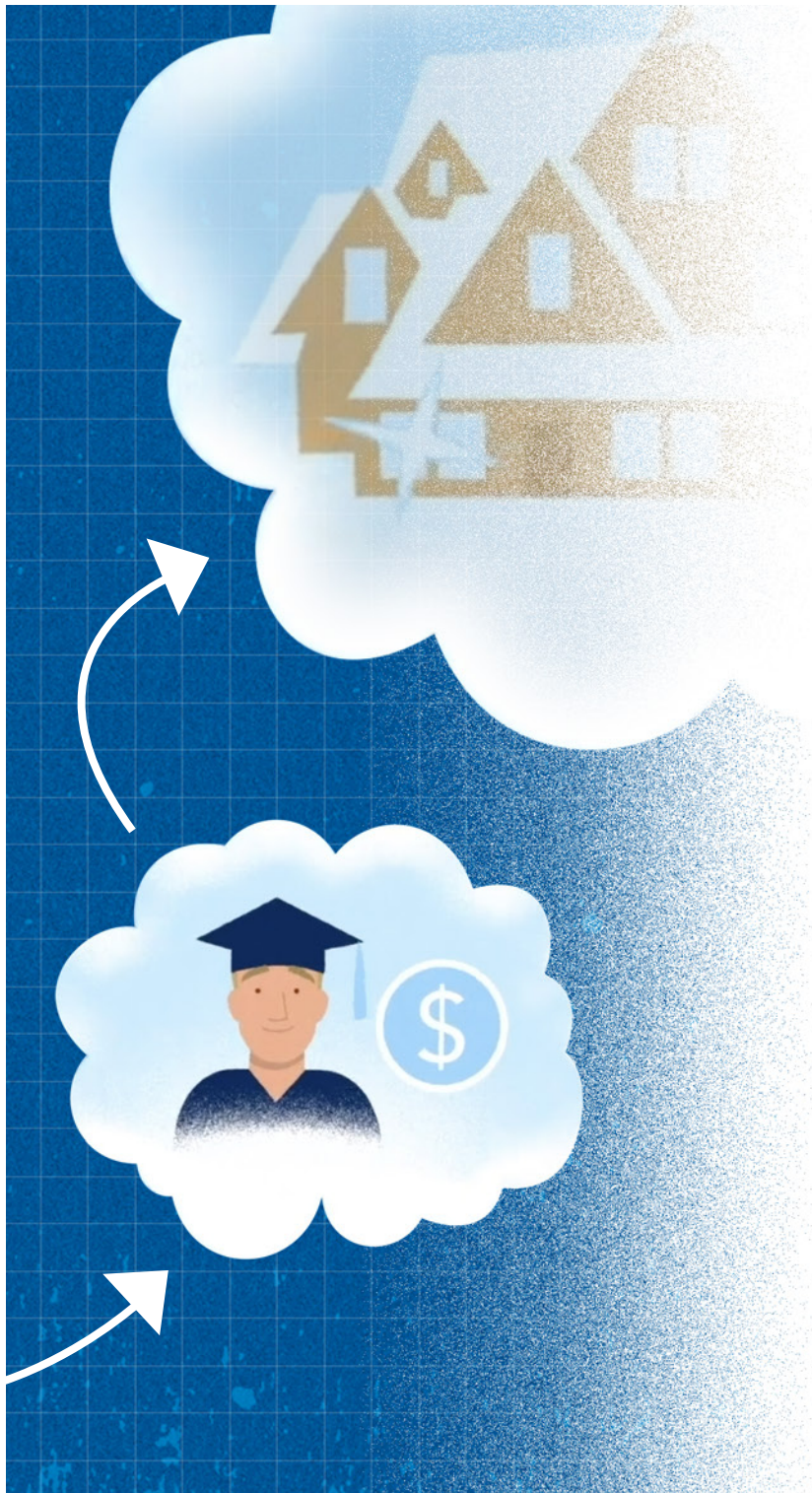
Clients are looking for an integrated, holistic strategy and service solution to help them pursue what matters most.

So how can you and your firm be the someone clients are looking for? How can you stand out?



MyLifePrint





1-2-
3-4

The Solution

My-LifePrint is a digitally assisted strategic planning and implementation toolset that creates a customized blueprint for advisors to help their clients build more than their wealth. You can help them build their life.

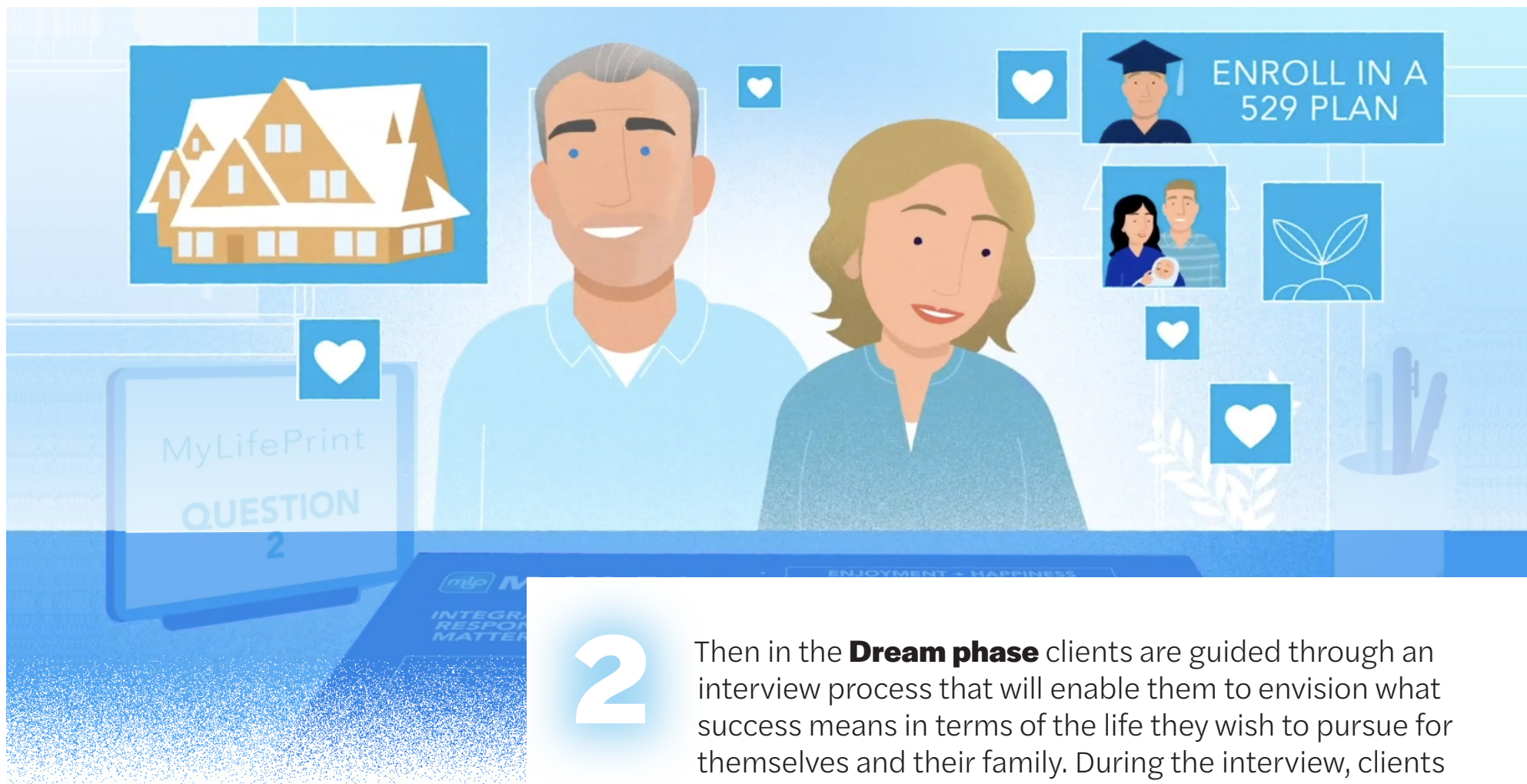
How It Works

My-LifePrint uses a **4-step process** that produces a framework for advisors to help clients use what they have to get what they want. A plan is established to determine what resources and actions are needed to achieve their dreams. Each step of the process builds on the preceding steps.



1

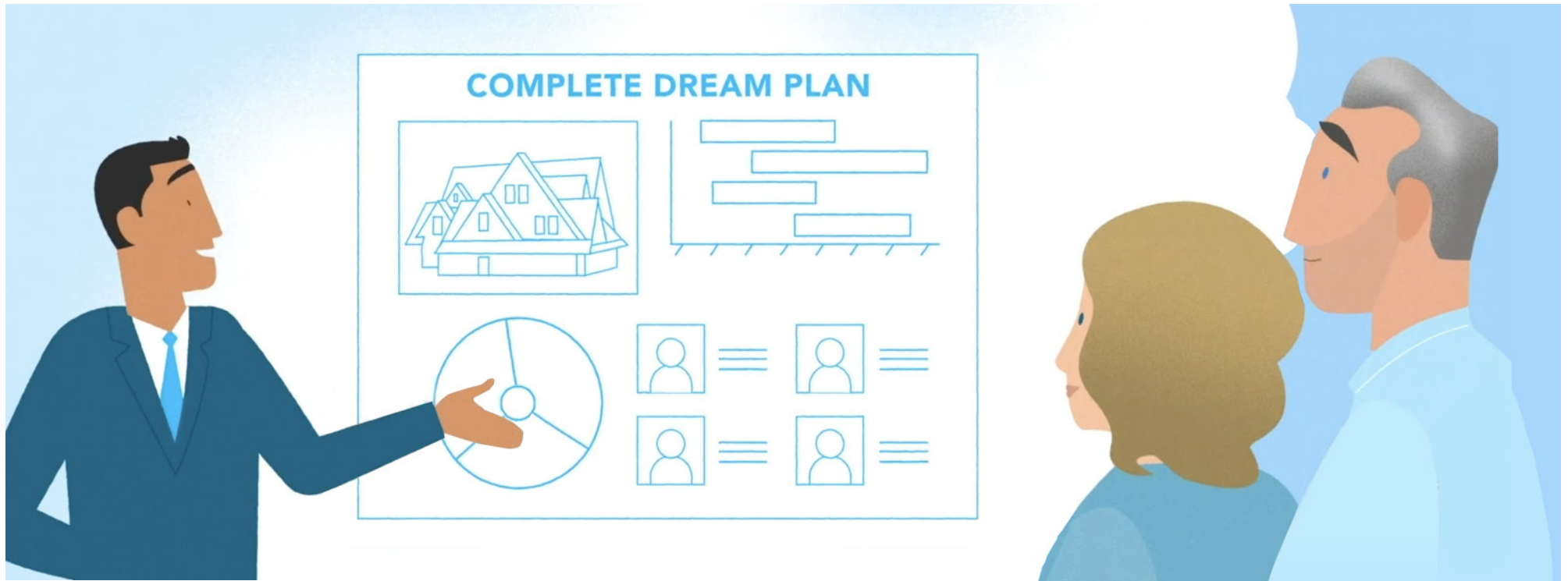
In the **Discovery phase**, advisors use a guided interview process via the online digital assist platform to understand how their client's life story has helped shape and form who they are today and as a result what's important to them in terms of their values and beliefs. The process helps clients be aware of which values are truly important and how they wish to live them and use them for making purpose-driven decisions. It becomes the "why" behind every decision that needs to be made and what every decision is measured against.



2

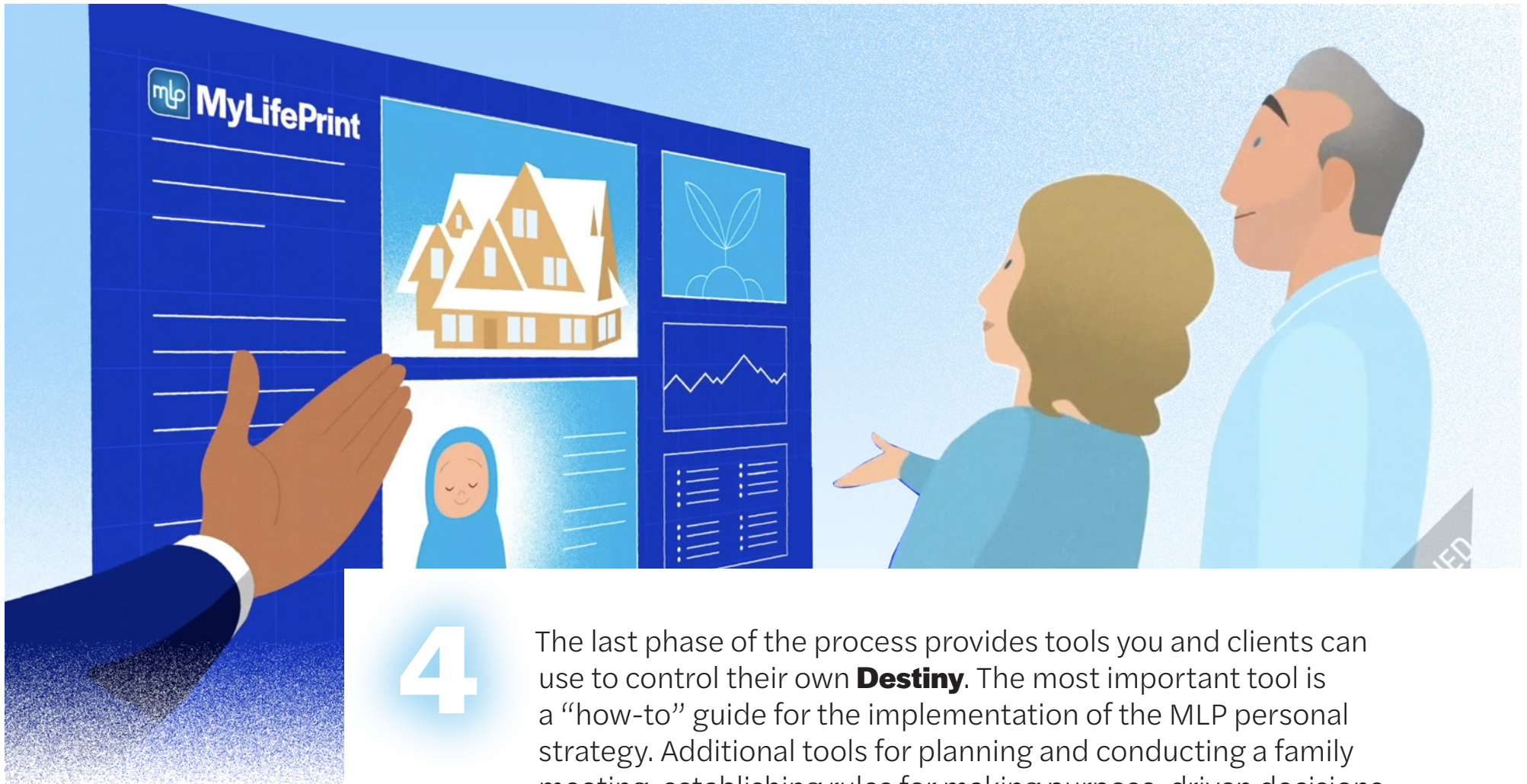
Then in the **Dream phase** clients are guided through an interview process that will enable them to envision what success means in terms of the life they wish to pursue for themselves and their family. During the interview, clients are prompted to focus on four measures of success:

- How do they wish to enjoy life?
- What do they want to accomplish?
- How do they want to make a difference?
- What do they want to pass on as their legacy?



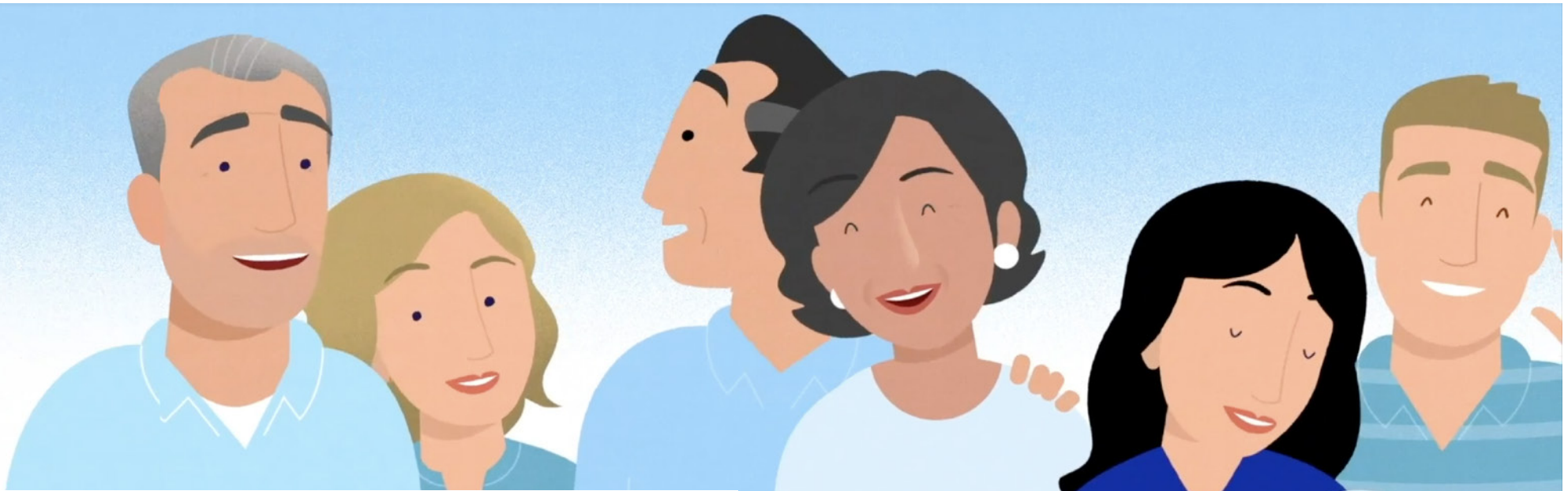
3

The power of My-LifePrint comes to life in the **Design phase**. This phase brings order and logic to what needs to be done to pursue what is most important to clients at any given time to live the life they want for themselves. Blueprint-sized printouts are created to visually illustrate the client's My-LifePrint strategy. A Guidebook is generated at the conclusion of the Design phase that lays out the client's personalized strategic plan and implementation schedule.



4

The last phase of the process provides tools you and clients can use to control their own **Destiny**. The most important tool is a “how-to” guide for the implementation of the MLP personal strategy. Additional tools for planning and conducting a family meeting, establishing rules for making purpose-driven decisions through the use of a family charter, NexGen financial education, and recommendations for onboarding new family members as they become eligible to participate in the management of the family’s affairs are provided in this phase. Lastly, tips for improving relationships and communication skills are provided to assist you and your clients in fostering a healthy family dynamic.



Why My-LifePrint Matters

Professional service providers are becoming commodified and marginalized. My-LifePrint differentiates your firm from the competition. Using My-LifePrint, you can help your clients figure out what they want, put a plan together, oversee the work, and make sure it stays on track. As the architect for their plan, you can help them see the big picture and plan to pursue their dreams.

Clients will turn to you as their most-trusted advisor who will help them manage all aspects of the business of their lives. My-LifePrint puts you in position to provide the full array

of your services and solutions to help clients pursue the life they desire for themselves and their family.

My-LifePrint will truly make a difference in the lives of clients and advisors through its ability to fully address what matters most.



Next Steps

My-LifePrint will differentiate your firm with a service beyond wealth management. Help your clients build their lives. Contact us to learn how you can use My-LifePrint to position your firm as your clients' most-trusted advisor.

513.460.2753 • **macasella1@my-lifeprint.net**
my-lifeprint.net



513.460.2753

macasella1@my-lifeprint.net

my-lifeprint.net