

# Planning for CONFIDENCE

How do you know if you'll have enough? It's not something to guess at.



PROSPERITY  
PARTNERS  
PRIVATE WEALTH MANAGEMENT

## The Prosperity Partners Financial Blueprint

With Built-in *Confidence Meter*

### A Planning Tool

The Prosperity Partners **Confidence Meter** helps put you at ease. It displays the likelihood you'll hit every goal, even taking into account unlikely downside events like poor market returns and bad timing. This allows you to plan for:

- Current lifestyle & travel
- Year you retire and retirement lifestyle
- Funding family events (weddings, education, new homes, etc.)
- Leaving inheritance & gifts

#### Probability of Success



78%

- Above Confidence Zone -

#### Probability of Success



56%

- Below Confidence Zone -

### A Course-Correction Aid

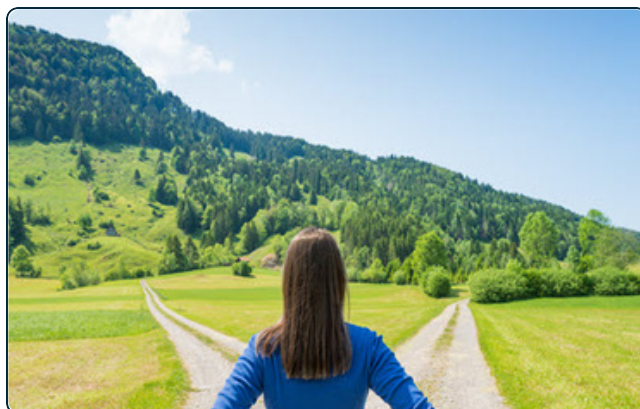
When reviewed regularly, if unforeseen events cause the **Confidence Meter** to drop, we explore options to restore it. For example:

- Adjust your investment strategy
- Shift earnings / savings / expenditures
- Re-order goals / priorities

### A Guide for Wise Decisions

The **Confidence Meter** also lets you ask questions and run scenarios such as:

- Changing jobs
- Having another child
- Selling property and reinvesting
- Exploring where to retire (cost of living, taxes, etc.)



Turn Over to Learn How Your Custom Financial Blueprint Works →

## Guiding You to and Through Prosperity

**Can we ever know with certainty how long we'll live, or how markets will react between now and then?**

Of course not. But you can still have confidence you will experience everything most important to you and even have a safety margin. As your *Chief Prosperity Officer®*, we're all about translating your wealth into goals you actually attain.

## How Your Custom Financial Blueprint Works

**Your road to prosperity has been unique to you. So is the road that lays before you.**

And we've perfected the art of exploring what you want your journey to look like.

### 1. Expand Your Possibilities

It all starts with expansive thinking. What could you actually live out if you really think big? Not just for you, but your family, heirs, and causes? Our experience shows that most clients think too small, so together we discover new possibilities and explore how to bring those within your reach.

### 2. Prioritize Your Needs / Wants / Wishes

Here we help you assign importance (1 through 10) to:

- All aspects of your lifestyle - both NOW and in the future
- The age you want to retire (or begin to back off)
- Your big goals from Step 1

### 3. Calculate the Variables

Now you get to see the probability of achieving ALL your goals together. Using a sophisticated Monte Carlo Simulation, we factor in all your assets, liabilities and cash flows. We look at possible rates of return, market dynamics, major setbacks and life expectancy. Most importantly, how might the unexpected derail your goals? What happens if you shift priorities? What if some Needs later become Wants or Wishes?

**This dynamic approach also lets you compare various financial decisions to see which will produce positive impacts on your plans, such as:**

- Should we move to a state with lower taxes?
- What if I accept my employer's early retirement buyout?
- Can we afford to travel more now, wait until we're older, or do both?

## Knowing Your Strategy is Right

**It's not just about confidence in the future.** Everything in your Financial Blueprint guides how you invest *today*. The *Prosperity Partners Filter Process™* shows you exactly how a particular investment vehicle fits your Blueprint – and why other investments are ruled out. This tells you where you invest and why. It's part of our fiduciary level of care.

## YOUR OWN FINANCIAL BLUEPRINT



**What would such confidence feel like?**

Our no-obligation review makes it easy to find out. Reach out today to start a conversation.

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