



THE WAY 2 WEALTH®

Client Name:

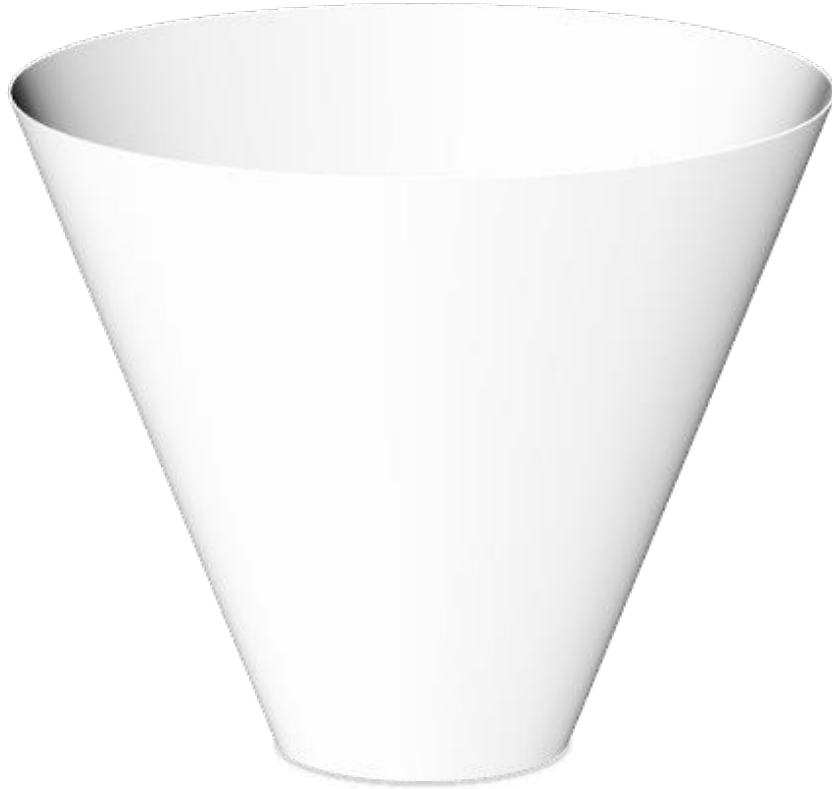
Date:

Tax Planning™

Tax Deferred

Taxable

Tax Free



- Pensions
- IRA
- 401 (k) / 403b

- Brokerage Accounts
- Bank Accounts
- Real Estate

- Roth Plans
- FSA / HSA / 529
- Cash Value LI

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