Life Event Assessment Process™ (LEAP)

After becoming a client at Life&Wealth Advisors, Inc. you will embark on the following five-step journey with us as your guide:

1 Discover.

We start by using the Life Event Prioritizer™ to identify and clarify the dreams and goals you have for yourself and your family. This means that you rank your goals, specify them in personal and financial terms, and order them in time. We then work to identify the financial resources you have available to achieve those goals.

2 Assess.

This results in an overview of where you stand today and an assessment of the Life Event planning needed to realize your dreams. You provide us with relevant information about your resources and obligations so that we can evaluate if your goals are obtainable. Then we identify the opportunities and risks associated with achieving them.

3 Decide.

The collaborative Life Event planning done in the previous Discover and Assess phases generates personalized action steps for completion. Agreeing on suitable options and deciding the priority of implementation is the objective here.

4 Implement.

Once you know what you want in life and have decided how to get there, we work with you to facilitate accomplishment of the action steps you have identified. We provide on-going guidance as you progress with implementation and can direct you to other resources, if necessary.

5 Monitor.

To help you stay on course, we regularly review your progress. Together, we evaluate what has been successful and what needs improvement. The monitoring process may flow into a new Life Event Assessment Process™ cycle if your life's journey requires reassessment.

The **Life Event Assessment Process™** has the flexibility to be a continuous tool in our life-long partnership of planning and preparing for Life Events and related transitions as they occur.