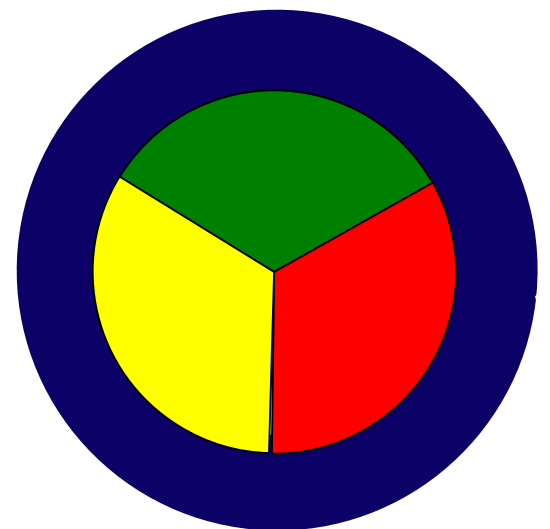


Life DesignTM

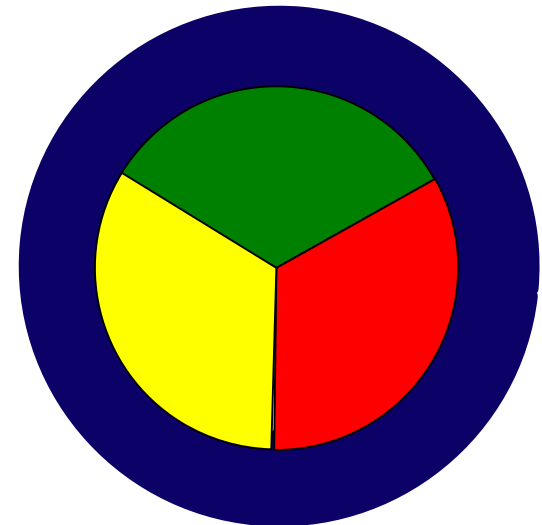
Lifelong planning to preserve your lifestyle

Beacon Asset Management, Inc.
14039 N Dale Mabry Hwy
Tampa Florida 33618



LifeDesignSM Process

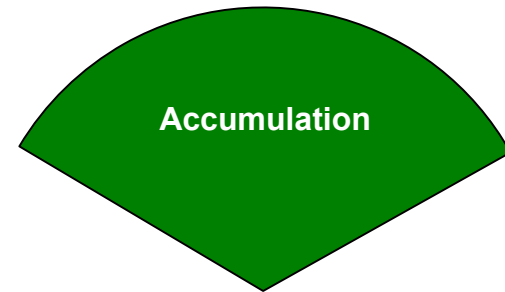
- What's IMPORTANT about Life To You?
 - Purpose – why?
 - Vision – what?
 - Values – leadership
- Who is IMPORTANT To You?
- When is it Important
 - Goals – Timelines
- Does it matter to you?



Wealth Phases: **Accumulation**

Accumulation

- Cash Flow Management
- Asset Management



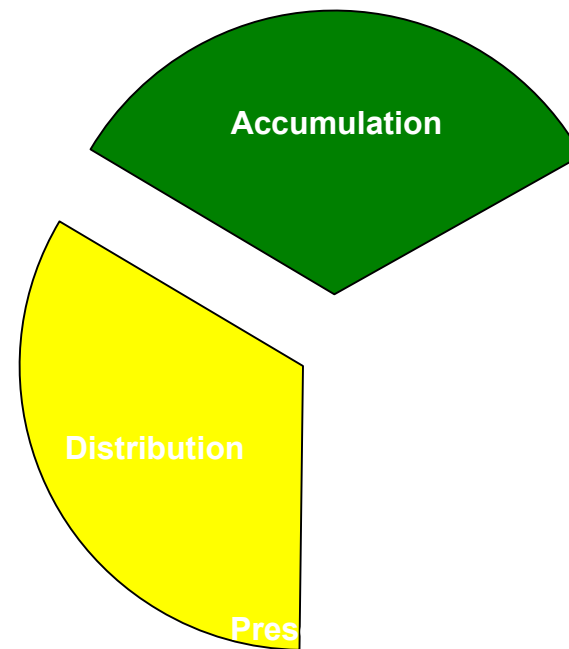
Wealth Phases: **Distribution**

Accumulation

- Cash Flow Management
- Asset Management

Distribution

- Policy
- Timing



Wealth Phases: **Transfer**

Accumulation

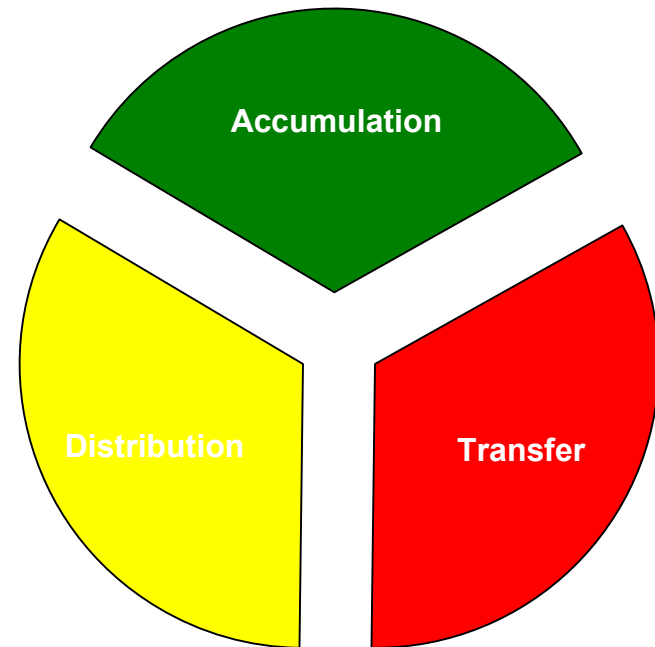
- Cash Flow Management
- Asset Management

Distribution

- Policy
- Timing

Transfer

- Policy
- Timing



Wealth Protection

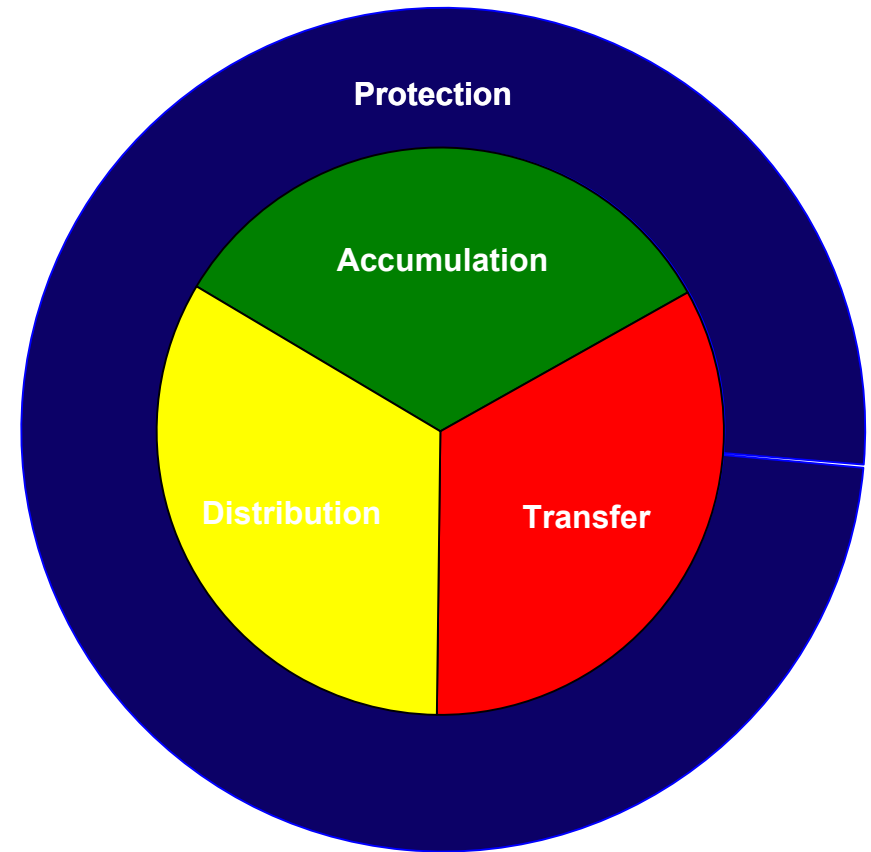
➤ **Income (Cash Flow)**

- **Disability**
- **Liability**
- **Catastrophic**
- **Death**

➤ **Assets**

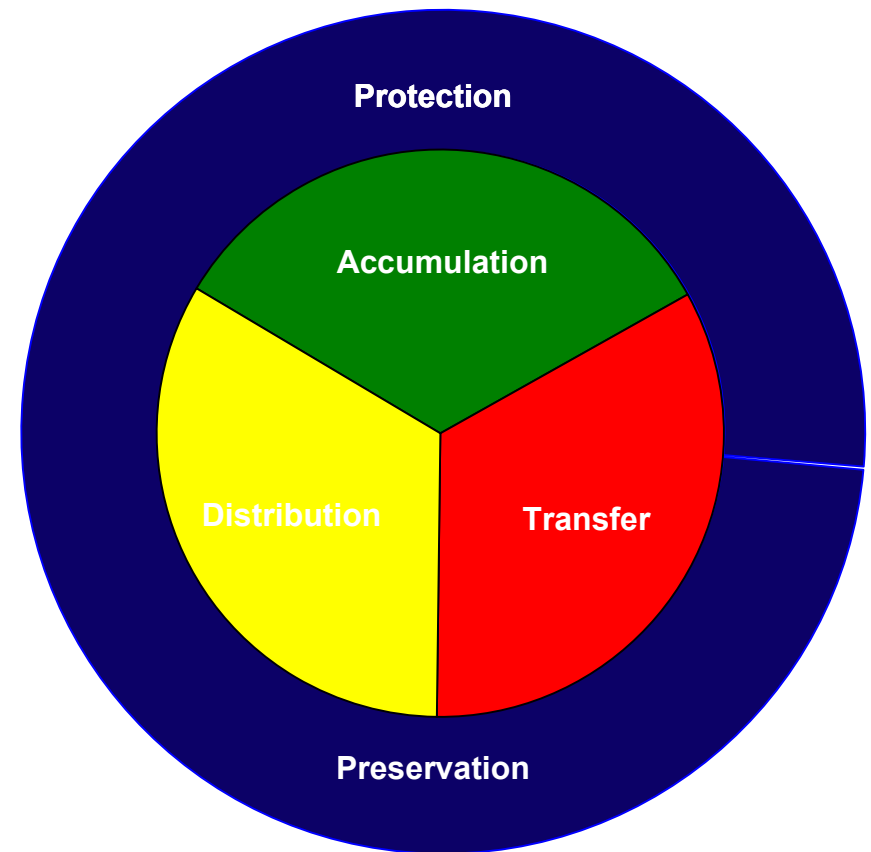
- **Disability**
- **Liability**
- **Catastrophic**
- **Death**

➤ **Insure or Self-Insure?**



Wealth Preservation

- Tax Management
- Debt Management
- Ownership
- Instructions
- Documents
- Trusts
- Trustees
- Custodians
- Guardians



What We Do

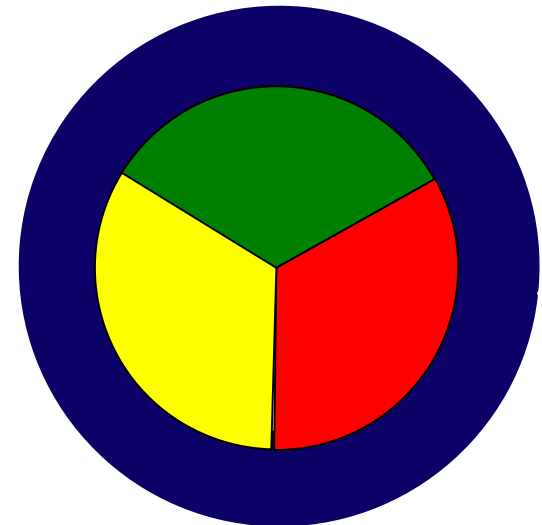
Help you define your Ideal LifeDesignSM

LifeDesignSM Team analysis of your present situation

Create and present your LifeDesignSM solutions

Establish goals and timelines for LifeDesignSM execution with you

Periodically review and adjust your LifeDesignSM with you



What You Do

Decide you want to proceed

Communicate openly

Actively participate

Provide all “Data”

Execute “Action Steps”

