

# The Wealth Enjoyment System<sup>™</sup>

## A FINANCIAL BLUEPRINT

### Discovery<sup>™</sup>

A unique and enlightening process that helps you discover what you really care about and uncover estate planning goals you can get excited about.

### Lifestyle Protector<sup>™</sup>

Utilizing your expectations for your desired lifestyle as well as your portfolio's historical performance, we verify the amount of assets you need to protect your lifestyle. This allows us to help you properly allocate assets between Financial Independence, Family Legacy, and Social Capital Legacy in a manner that enhances your confidence about your future.

### Asset Solution<sup>™</sup>

A revealing process that helps you expose any inappropriate risk inherent in your investment portfolio and develop more confidence in the projected results. Together, we tailor your portfolio to help you protect and grow your wealth.

### Wealth Enjoyment Options<sup>™</sup>

We use the information learned in the first three steps to develop a preliminary list of planning techniques that could be used to enhance your estate plan. In a series of enlightening and informative sessions, you learn about the concepts and determine which techniques are truly right for you and your family.



### The Wealth Enjoyment Protection Program<sup>™</sup>

This is an annually renewable review and upkeep program designed to protect the integrity of your Wealth Enjoyment Plan.<sup>™</sup>

### Wealth Enjoyment Plan Construction<sup>™</sup>

We supervise the construction of your Wealth Enjoyment Plan<sup>™</sup> to ensure that it is built to your specifications.

### Wealth Enjoyment Blueprints<sup>™</sup>

Based on your earlier decisions, we present a comprehensive blueprint of your Wealth Enjoyment Plan.<sup>™</sup>

### Wealth Enjoyment Team Consensus Builder<sup>™</sup>

We ensure your entire team — lawyers, accountants, and other professional advisors including us as your Estate Planning Designers & Developers<sup>™</sup> — work together on your behalf to eliminate conflicting advice and produce the best possible estate plan.



Cash & Associates, PA.  
Estate Planning Designers & Developers

