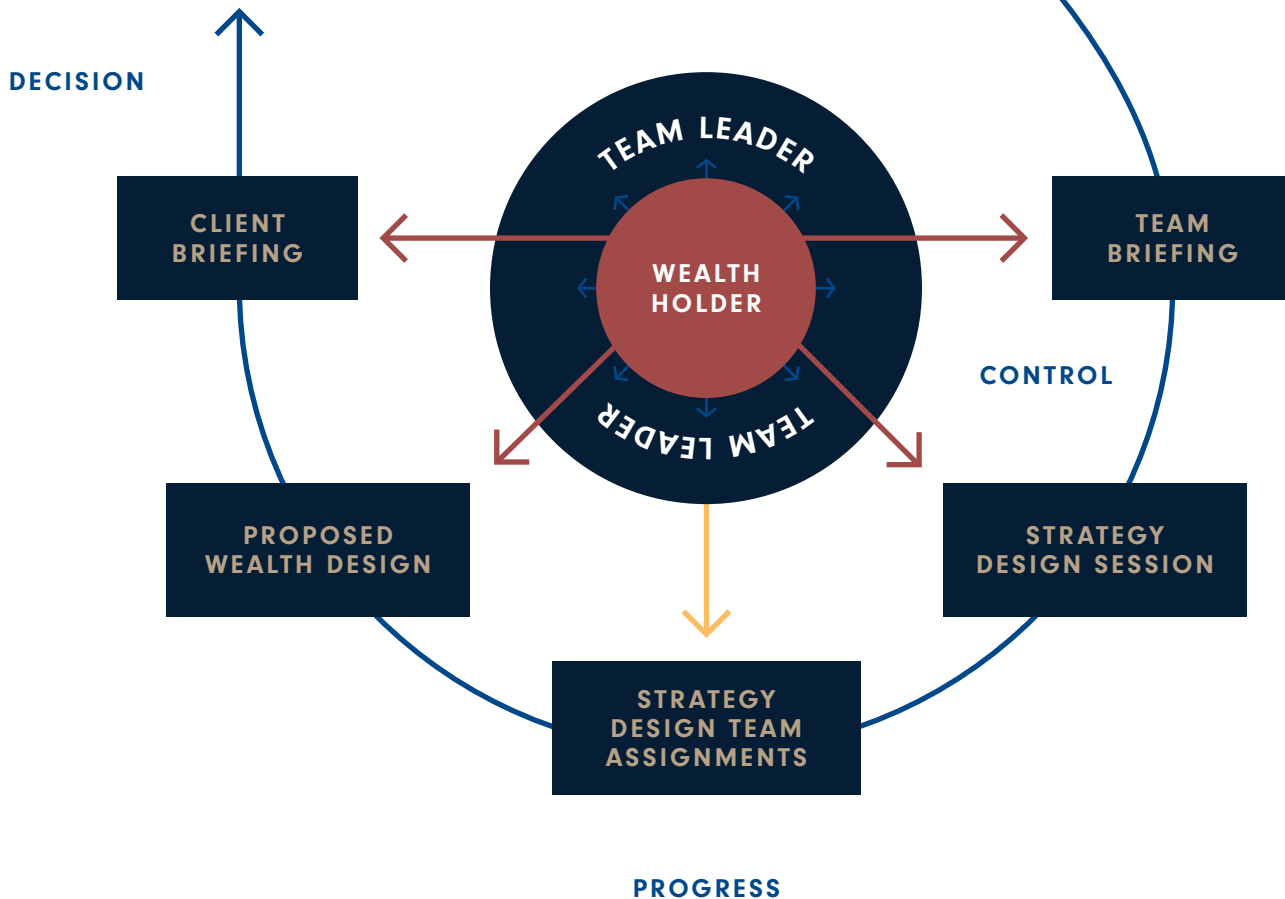


CLIENT NAME(S)	<h1>THE CREATIVE SOLUTIONS PHASE™</h1>	DATE
	<p>THE DISCOVERY PHASE™ CLARITY</p>	
<p>THE PLANNING HORIZON™</p>		

THE STRATEGY DEPLOYMENT PHASE





PREVIOUS PHASE:
 — THE DISCOVERY PHASE™ —
 CLARIFYING WHAT THE CLIENT IS TRYING TO ACHIEVE AND WHY

THE CREATIVE SOLUTIONS PHASE™

Identifying Solutions to Achieve the desired results.

TEAM BRIEFING

Briefs the Core Team regarding each gap identified in The Discovery Phase and why it is important to close each gap.

STRATEGY DESIGN SESSION

A meeting of the Core Team to review and discuss possible strategies for closing the planning gaps.

**STRATEGY DESIGN
 TEAM ASSIGNMENTS**

Each planning gap is assigned a Strategy Design Team with the responsibility to identify, refine, select and model an acceptable solution for closing their assigned gap(s).

PROPOSED WEALTH DESIGN

Each selected strategy is integrated into an overall model that reflects the incremental and cumulative results achieved.

CLIENT BRIEFING

The Proposed Wealth Design and each integrated strategy are reviewed for Deployment. The plan is either approved or returned to the team for further consideration.

NEXT PHASE:
 — THE STRATEGY DEPLOYMENT PHASE™ —
 TURNING DECISIONS INTO RESULTS

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