ACTION REQUIRED

Before We Meet: Your Pre-Call Checklist

Your call is reserved but As of right now, not confirmed yet this is because your advisor typically want to confirm that you'll actually be attending otherwise they'll have to give your reservation away to somebody else.

Simply watch this entire video complete the three simple steps to ensure that your call does not get canceled.

But first here's exactly what you'll be covering on the call with your advisor, Firstly you'll be identifving hidden risk in your account, you may not know existed that could ruin your retirement plans. You'll also be discussing the number #1 most powerful income stream to add to your specific portfolio based on your specific situation. And you'll be discussing what to do if the market crashes again in the next 12 to 24 months. Also how to design your portfolio depending on the kind of lifestyle that you want to live and the most common mistakes to avoid that could cost $300,000 or more in retirement. This happen very often and most don't know about them. And lastly of course how to pay less taxes retirement, very important.

And again your call is not yet confirmed, in order to confirm it all you have to do is

STEP 01

Step 1. Go to the email or text that you just received from your advisor and reply "Let's Talk" and be sure to check if it went to spam, so if it went to spam just go drag the email from your spam box to your inbox.

Then once you say "Let's Talk" just send them the biggest thing you're looking for help with or the main goal you have that you'd like to discuss. If they don't hear anything from you, they will just assume that you aren' serious and they'll have to cancel your call.

STEP 02

Step 2. Add the call to your calendar and reminders now. You can as well accept the calendar invite. It's also recommended that you add notes down on what you plan to discuss on the call.

Note if you Miss the call, you'll need to schedule a new strategy consult which will cost $500

STEP 03

Step number 3. Come to the call with a clear vision of what you want. You can't live your dream retirement lifestyle, If you don't know exactly what it looks like so think about how much income do you want? How do you want to spend your Time? What problems do you never want to deal with? Have a very clear vision painted out because this call marks a pivotal moment for a lot families. Because the advisor that you booked with has licenses and specialized knowledge that most generic advisors just don't have. This is why families with $500,000 to $5 million dollars and even wealthy families and ultra high net worth individuals go to them when they want their existing savings to generate more cash flow in retirement through strategic structured

> investments. And some of these strategies and investments have been used by the wealthy for decades but are off-limits to every day investors unless you have connections through a select advisor like them, so it's really one of the proven ways to mitigate the risk of running out of money in retirement.

Now more than ever experts are warning a million dollars is just no longer enough. It's just the bare minimum now. So whether you have $500,000 to $5 million dollars or more, strategic cash flow portfolio in structured systems is how you generate enough monthly income to cover up all your expenses in retirement with more leftover at the end to enjoy regardless of how much you have. That way you can spend every minute of your time doing exactly what you want with whoever you want, wherever you want. The framework your advisor uses is designed to do exactly that. In fact this exact framework draws on decades of research in modern financial economics, including Nobel Prize–recognized work in portfolio risk management and asset pricing and it's been used since then by wealthy families ever since.

The only bad news is that your advisor does not work with everyone, but even if you don't qualify to work with them you will still get a lot of value from the call and a lot of actionable insights from the call. Now if you do qualify to work with them then you'll be able to shortcut their waitlist because you reserve this call directly with them. So just make sure that you're ready when they call your phone number at the time of your appointment.

You will find some more free training, educational docs, videos and information to browse through in the meantime. We look forward to delivering strong returns for mutual growth and successful partnership.

Talk soon and thank you for your time.