03.14.18 Nylic, John & Jane Prep Notes

Discussion Points

* Review Initial Analysis
* Core Narratives
  + The Story Relative to Rich Income, Assets, Heirs

How are they creating a healthy income

How are they building economic value outside of themselves

How are they providing opportunities to heirs

* + - Income - Income Tax
    - Assets - Standard of Care for Liquidity (Variable% to Fixed%)
    - Assets- Standard of Care for Liquidity (Pre Tax% to After Tax%)
    - What if Scenarios – Estate Plan & Doc’s

Main Screen

* Initial Analysis
* Where are Taxes Going?
* Eye On Washington Tax Chart
* Taking Turns at the Top
* Planning Shepherd Dynamic Growth
* Gotomeeting Test
* Reflector/Airplay Test

Second Screen

* Initial Analysis
* Pie Chart Drawn Notes (Visual Story)

IPad

* Initial Analysis
* Blank Page