## The Journey from Surviving to Thriving



## Taking care of me

## Taking care of business

## Taking care of more

## 1. LOSS - Ending

#### 2. GROWTH - Journey

#### 3. GRACE-Transformation

# Triage / Stabilize Living with the change

#### Taking care of family and absorbing what has changed

- Care and attention to your health and wellness
- Focus on immediate needs, cash flow & asset changes
- Highly vulnerable time -delay big irrevocable decisions

## Planning – Beginning to Cope From "what was" to "what will be"

- > "Who are you" exploration
- "Initial Financial Steps" done
- Stress test life and financial options – home, income etc.
- Changes to estate, tax, and investment planning
- New activities and experiences

# Reclaiming – Looking Forward A new life evolves

- Reinvention; repurposing; independence
- Values based life & goal planning
- Moving forward, executing on your new life.
- Long term estate, charitable, and family planning

**Breathe** 

**Balance** 

**Fulfillment** 

## FEELING FINANCIALLY SECURE

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