

THE ASG FINANCIAL INDEPENDENCE BLUEPRINT



What's Your Plan for Financial Independence? sm

Clarify your goals. Map your strategy. Prioritize your next moves.

At the Advanced Strategies Group (ASG), we believe high-performing attorneys deserve financial advice that's as sophisticated and strategic as the work they deliver every day. That's why our initial engagement is designed to deliver clarity, uncover opportunities, and establish trust—before any long-term commitment is required.

We don't sell. We solve, serve, and support through personalized strategies that meet you where you are and help you get where you want to go.

Our mission is clear: to protect our clients' income, assets, and financial independence from creditors, predators, professional pretenders, and confiscators with taxing authority.

It all starts with one question: **What's Your Plan for Financial Independence? sm**

WHAT YOU RECIEVE

Our Financial Planning Blueprint provides a comprehensive, multidisciplinary assessment of your financial life. You'll receive a personalized report and actionable recommendations developed by ASG's credentialed fiduciary team. Our goal is to help you optimize your saving and investing, the assets you've already accumulated, and the projected retirement income you will generate while offering strategies for mitigating the annual and lifetime taxes you will pay.

This is not just planning for today—it's alignment for a lifetime with a focus on:

1. Simplifying Your Financial Life	2. Saving You Time & Taxes—Now & Later	3. Mitigating Risk Exposure	4. Improving Outcomes for Investments, Cash Flow, & Legacy
<ul style="list-style-type: none">Organizing your assets, liabilities, and documents in a secure, digital platformStreamlining financial decision-making with one centralized system	<ul style="list-style-type: none">Identifying current inefficiencies and overlooked planning opportunitiesProjecting lifetime tax exposures and develop strategies to reduce them	<ul style="list-style-type: none">Analyzing gaps in income protection, creditor protection, and estate strategiesStress-testing your financial foundation for life and legal risks	<ul style="list-style-type: none">Evaluating your portfolios, firm benefits, compensation structure, and liquidityOptimizing after-tax wealth transfer strategies to increase net-to-heirs impact

OUR TRANSPARENT FEE STRUCTURE

Fee	Fee Range	Payment Schedule*
1% of your prior year's gross income	Minimum: \$2,500 Maximum: \$10,000	50% due upon engagement 50% due after you receive and review your final deliverables

**Preferred Professional Courtesy Pricing and Tier-Based Flat Fee options are available when the Blueprint is delivered through the ASG Law Firm Benefits & Planning Platform.*

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SATISFACTION ASSURANCE & CREDIT POLICY

We are confident in the value we deliver—but you'll decide for yourself:

1. After reviewing our planning deliverables, if you don't believe we've provided meaningful insight or value, we will waive the final 50% of our fee, no questions asked.
2. If you choose to move forward with ASG to implement any of our recommended strategies through investments, insurance, or other solutions, we will apply any ASG-generated revenue against that final payment.

NEXT STEPS: ONE-AND-DONE OR A GATEWAY TO ONGOING STRATEGY

Your Financial Independence Blueprint can be a stand-alone, one-time planning relationship, or it can serve as your entry point into the ASG Attorneys' Edge Planning Platform & Ecosystem—a tiered advisory model offering sophisticated, ongoing support personalized to your income, assets, complexity, and career stage.

We meet you where you are—and help get you where you want to go.

What's Your Plan for Financial Independence? sm Let us help you define it, protect it, and ultimately, enjoy it.

READY TO EXPLORE A RELATIONSHIP?

Schedule a confidential discovery call with Brooke Holden to learn more: brooke.holden@mystrategyteam.com

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