



Financial Advisors

Helping You Preserve, Build and Transfer Wealth

The UltraVision System[®] Value Proposition

Taxes

Many successful business owners pay more taxes than they have to. Are you?

Protection

Successful People who don't manage this well are regularly destroyed financially. Are you protected?

Insurance

People do not test the appropriateness of their insurance before they need it. What is your insurance like?

Cricket

Having a cricket on your shoulder dramatically enhances getting the results you desire. Who is your cricket?

Confidence

Members of The UltraVision System[™] Club experience higher levels of confidence in their financial decisions. Are you confident?

Math Model

A financial math model projecting the results of your current course creates amazing clarity for decision making and course corrections. Do you have one?

Philanthropy

The UltraVision System[™] enables above average people to trade tax dollars for philanthropy and end up wealthier in the process. What causes do you believe in?

Costs

If you have not done market research on all of your financial tools lately, you are likely to be overpaying by 2 to 3 times the fee for The UltraVision System[™] for many financial tools in your life. Are you?

Allocation

Proper asset allocation of all your financial resources (aligning your resources with your risk tolerance) is the most significant factor leading to efficient investment risk management. Are you happy with yours?

Transfer

Desired wealth transfer results do not take place when successful people die unless they have a process for regularly maintaining their wealth transfer plans. The UltraVision System[™] delivers this. How will your wealth transfer?

Collaboration

Successful business owners and high-paid corporate executives make the greatest financial progress when they have a coordinated team of advisors that play nicely together for the benefit of the client. Are you making progress?

Delegation

Our best clients are excellent delegators. Most are capable of doing much of what we do but choose not to. Delegators get amazing leverage of their thoughts and greater control over their financial tools and resources by engaging in The UltraVision System[™]. Do you delegate?