

Wealth Preservation For the Affluent

A Practical Guide to Help High Income and/or Net Worth clients with:

Asset Protection
Income Tax Reduction
Estate Planning
Financial Planning
Business Management

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- 1) 35 year old client
- 2) 45 year old client
- 3) 55 year old client
- 4) 65 year old client

Help from the Author

Help from the Author.....

Loss Test (how much you are losing in taxes by not planning correctly)

Client Questionnaire