

SUCCESS COMPLEXITY TRAP



**AS YOUR BUSINESS, FAMILY AND WEALTH GROW,
LIFE CAN BECOME FAR MORE COMPLEX.**

- Lack of Master Plan
- Scattered Assets
- Uncoordinated Financial Products
- Too Much Paperwork
- Overpaying Tax
- Reactive, Not Proactive
- No New Ideas
- Unaware of Financial Hazards
- Falling Short of Goals
- Disjointed Team With No Leader
- Key People Not Informed About Plan
- Disorganization of Valuable Documents