Wealth Protection Clarity System

WEALTH PROTECTION CLARITY SYSTEM

The Wealth Protection Clarity System helps you determine how well your client is performing against 3 critical risk management areas that affect your clients' family, business perpetuation, and legacy. Developed by best-selling author Larry Linne, one of the leading consultants in risk management, this tool is free, confidential, and takes just 15 minutes to complete.

Risk Summary Rating

Green
High Probability of Success

Yellow
Medium Probability of Success

Red
High Probability of Failure or Loss

- **Is Your Client Properly Funded for an Unplanned Event?**
- **Have You Considered the Tax Implications and Costs of Insurance?**
- **Are You Fully Addressing Family and Small Business Owner Perpetuation?**

For RIAs and Financial Advisors

As a financial advisor, your value is shown through comprehensive and complete planning for clients. Our Wealth Protection Clarity System provides you with an additional tool to quickly assess 3 critical risk areas that can affect your clients' lifestyle, assets, and financial security.

We provide you guidance on the red and yellow areas identified and how they affect your clients' overall risk performance over time. Using the Wealth Protection Clarity System, you gain a new value-added service that elevates the client experience and honors your fiduciary role.

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