

Should wealth be measured in dollar bills?

Discover clarity
Find organization
Receive direction



“In 2003, I set out to solve the successful family dilemma—you’re busy, you have concerns, and you want to feel good about your financial life.”

We started by getting rid of everything in the financial service industry that didn’t serve the successful family:

- ❌ A model dependent on getting people and/or their money through the doors like a health club— leaving it up to the clients to get healthy.
- ❌ The conflict of interest between selling product and providing advice— advice that usually doesn’t take into account all aspects of your financial life.
- ❌ A fee structure that penalizes you for asking questions; costs that are not transparent; and fees that fluctuate.

The result of this
purification is the
Insight LifePath™.

LifePath clients are
empowered to spend
more time on what
is most important to
them because...



wealth should be measured
by how much freedom you
have in your life.

MORE
FREEDOM

LIFE BEFORE INSIGHT LIFEPATH™

WILL MY CHILDREN BE TAKEN CARE OF?
CAN WE PAY FOR COLLEGE?
ARE WE ON TRACK WITH OUR GOALS?
AM I PAYING TOO MUCH IN TAXES?

THE STOCK MARKET SCARES ME!
ARE WE PROTECTED IF SOMETHING BAD HAPPENS?
ARE WE SAVING ENOUGH?

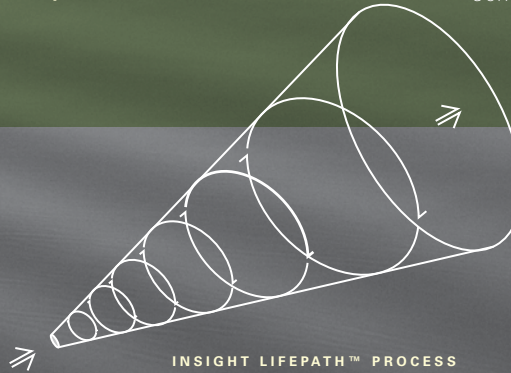
YOU

IS THERE SOMETHING ELSE WE SHOULD BE DOING?
AM I MAKING THE BEST DECISIONS IN MY BUSINESS?
AM I FALLING BEHIND?

WILL WE EVER ACHIEVE OUR DREAMS?
CAN WE BE DEBT FREE?
WILL WE HAVE ENOUGH FOR RETIREMENT?

MORE TIME
REQUIRED
TO JUGGLE
FINANCIAL
PIECES

TIME
SCALE



INSIGHT LIFEPATH™ PROCESS

YOUR INSIGHT LIFEPATH™

DREAMS
GOALS

YOU

CLARITY

LACK OF
CONFIDENCE

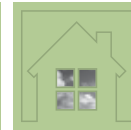
CONFIDENCE
SCALE

The Insight LifePath™ provides three distinct benefits:

- 1 Unlimited access to our wisdom and our insight because we limit the number of clients we serve.
- 2 A flat fixed fee we agree upon annually that comes with our satisfaction guarantee.
- 3 A unique process to educate, guide, and implement your planning through a team of independent experts, and the follow-through to make sure your financial world is kept in order so you can live your ideal life.



Our six LifePath Reports create simplicity and confidence in your life. The Insight LifePath helps you to keep more of what you have, fills gaps to cover your back, harmonizes your assets, and empowers you to live with purpose.





insight
lifepath™

Would you like to see if the Insight LifePath is right for you?

Gain clarity, organization and direction with our LifePath Design Process. Your \$2,150 investment for this introductory experience is guaranteed—we wouldn't have it any other way.

Are you going to continue on the financial trail with only your gut instinct to protect you?

Much more than just investments, our unique ability is to make wisdom actionable.

With advice to avoid financial missteps, and counsel to keep you on track, you'll have the freedom to pursue wealth that isn't measured in just dollars.

Spend more time on
what is important to you
and less time worrying
about finances.

InsightLifepath.com

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from Insight Financial Group, Inc.