



## MOVING FROM SURVIVAL TO SIGNIFICANCE

**Survival** – is just that! Surviving!

**Stability:**

1. A working home budget
2. A significantly sized life insurance policy
3. A will
4. An automatic withdrawal into your savings account
5. One month expenses in savings account

**Success:**

1. A financial and retirement plan
2. A living, revocable or irrevocable trust
3. Annual assessment of your net worth
4. Real estate and stock investments
5. 3-6 months expenses in reserves

**Significance Plan:**

1. Passive investments provide for your current lifestyle
2. Gifting strategies

There is wisdom in seeking many counselors – financial advisors, attorneys, accountants - those that can help you make this journey! If you need a referral to a trusted advisor, just let me know.

I remain committed to helping you in your journey of business and personal success!

**Judy Sylvia**

The Growth Coach  
(239) 425-2530

[j.sylvia@thegrowthcoach.com](mailto:j.sylvia@thegrowthcoach.com)

[www.thegrowthcoach-leecounty.com](http://www.thegrowthcoach-leecounty.com)