

The 3 Stages of Progress™ For Successful Families

By Keith M. Lichtcsien, CFP®, AEP®

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STAGE 1

Are we truly financially independent? If not, “How will we become so, and how long will it take?”

- “What specifically should we do?”

STAGE 2

Once we are financially independent, “How can we be confident we will stay that way and receive the income we want for as long as we live?”

- “How can I feel confident that my spouse will be taken care of after I’m gone?”

STAGE 3

Once 1 & 2 are accomplished with confidence, “How can we help our loved ones become financially independent?”

- “What can be done about the lien the IRS has against our assets?”
- “Are we being good stewards?”
- “Are we doing the right things for our family, or might we be creating impediments to their learning and growth... and happiness?”
- “Are we building on our family values, knowledge and wisdom?”
- “Are our charitable acts consistent with our values?”

Some successful families have accomplished The 3 Stages of Progress in one generation, while others have achieved it over two, three or four generations. The end result is knowledge, values and assets being preserved and leveraged for the family.

RSI can help you and your family develop and implement strategies and tactics to achieve and progress through these three stages. Call us at 216-765-0121 for more information.