Resource Strategies, Inc.
The power of strategic thinking™

The 3 Stages of Progress™

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STEP I

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

- What specifically should we do?

STEP II

Once we are financially independent, how can we be confident we will stay that way and get the income we want and need for as long as we live?

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

STEP III

Once 1 & 2 are accomplished with confidence, successful families ask, how can we help our loved ones be able to 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 we being charitable, 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.

This is *The power of strategic thinking*™ at work

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