DRAFT YOUR FANTASY FINANCIAL TEAM

Who is missing from your current roster?

For each role, check the box that best describes your current setup:

Head Coach - Financial Advisor

Your go-to for game strategy & season planning. Defines goals, builds investment strategy, keeps you disciplined.

- ☐ I have a trusted advisor I meet with regularly
- ☐ I have someone, but we rarely connect
- ☐ I don't currently have one

Offensive Coordinator - CPA / Tax Strategist

Maximizes tax savings. Prepares taxes, identifies strategies year-round, advises on deductions.

- ☐ My CPA actively helps me plan year-round
- ☐ I only hear from my CPA during tax season
- ☐ I DIY or don't have a tax professional

Defensive Coordinator - Estate Planning Attorney

Protects assets & legacy. Drafts wills & trusts, ensures smooth asset transfer.

- ☐ I have a current will/trust and updated docs
- ☐ I have documents, but they're outdated
- ☐ I haven't done any estate planning

Special Teams - Insurance Specialist

Covers the unexpected. Reviews life, disability & long-term care insurance, identifies gaps.

- ☐ I've reviewed coverage in the past 2 years
- ☐ I have coverage, but unsure if adequate
- ☐ I haven't evaluated my insurance needs

Performance Coach - Business Advisor

Builds income performance. Helps grow business/career, advises on scaling & efficiency.

- ☐ I have guidance helping me grow income/business
- ☐ I occasionally seek advice, not consistently
- ☐ I'm figuring it out on my own

Scorekeeper - Bookkeeper

Keeps stats clean. Tracks income/expenses, maintains organized financial records.

- ☐ My finances are organized and updated regularly
- ☐ I track things loosely or inconsistently
- ☐ My financial records are unclear or behind

General Manager - YOU

Final decision-maker & vision setter

You choose the team

You set the goals

You make the final calls

Next Steps: Build Your Championship Team

- ✅ Your team should communicate with each other
- ✅ Everyone should understand your goals
- ✅ You stay the ultimate decision-maker

AimWell FINANCIAL®

Draft wisely. Meet regularly. Adjust as your life evolves.

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