Retirement + Living Legacy

FOR THE CHILD-FREE FAMILY

PURPOSEFUL WEALTH ADVISORS®
A KEATING ADVISOR PARTNER

PAVE THE WAY TO YOUR FINANCIAL SECURITY, WELL-BEING AND LIVING LEGACY – WE CAN HELP ANSWER THESE QUESTIONS

- How can you be sure that your financial and healthcare needs are covered?
- How will your needs be met in later years or as your health changes?
- What can your income stream during retirement look like?
- How much can be set aside for giving back?
- How do you define your legacy?
- When can you retire?
- How soon and how do I start giving back?

The Experience of Giving-back

- Share Your Passion
- Foster New Relationships
- Cultivate Gratitude and Appreciation
- See Your Legacy in Action
- Make a Purposeful Difference in Your Community
- Encourage Giving Back to the Next Generation

'We make a living by what we get. We make a life by what we give.' ***Winston Churchill***

A Child-Free Retirement Planning Process

BASELINE

Evaluate your current financial status and create a personalized plan to meet your future financial and healthcare needs, ensuring sustainable revenue streams.

LEGACY FUNDS

Assess the funds available to determine the amount you can set aside for your legacy. This careful planning will ensure lasting impact and financial security.

EXPLORE

Embrace curiosity. What are your passions, values, and beliefs? Consider the impact you wish to make. Would a family foundation or donor-advised fund be right for you?

IMPLEMENT

Regularly give back, review, and adjust your plans to ensure that your financial, health, and legacy goals are consistently achieved.

ABOUT LISA *Financial Advisor, Purposeful Wealth Advisors*

Lisa's journey to becoming a Financial Advisor is anything but ordinary, and it gives her a unique perspective in financial advising. With over 35 years of experience in various industries, she's worn many hats—from leading roles as a **CPA** in life and commercial insurance to owning and running her own café and artisanal grocery store. Lisa's career is all about versatility and smart financial decision-making.

Lisa has a passion for helping her clients build a legacy of giving-back; especially to individuals without children. She specializes in crafting tailored plans for their retirement financial and healthcare needs, along with determining funds to facilitate a legacy of giving back. She believes that without the traditional goal of an inheritance, there is a wonderful opportunity to design a personal legacy. Once the financial side is secure, clients can explore their passions, contemplate their desired legacy, and engage in an active role of giving back to their community, no matter how big or small.

Lisa chose to work at Purposeful Wealth Advisors **(PWA)** because it embodies qualities that align with her values and aspirations. As a woman-owned, PWA fosters an inclusive and empowering environment that encourages innovation. Its entrepreneurial spirit resonates with **Lisa**, who loves being part of a dynamic team. The diverse skills within the team ensure clients receive comprehensive and insightful advice, enhancing their overall experience.

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