

We aim to pave the way for your legacy, to help ensure it reflects active participation and unfolds during your lifetime.

How can you be assured that your financial and healthcare needs are covered?

How do you define legacy? YES, your legacy can happen during your lifetime.

How soon can you start?

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Where do you start?

When can you retire?

How will your health care and financial oversight needs be met in later years or as your health conditions dictate?

How much can be set aside for giving back?

What can your income stream during retirement look like?



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

'I have found that among its other benefits, giving liberates the soul of the giver'

- Maya Angelou

Your 'Legacy During a Lifetime'



BASELINE

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



LEGACY FUNDS

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



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 help ensure that your financial, health, and legacy goals are consistently achieved.

ABOUT LISA SANTOS *Financial Advisor, Purposeful Wealth Advisors*

Lisa's journey to this industry is anything but ordinary, and it gives her a unique perspective in helping clients reach their goals. 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 passed the Series 65 this June and is looking forward to taking the next steps to be a Financial Advisor. 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 planned, 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 help to ensure clients receive comprehensive and insightful advice, enhancing their overall experience.



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