



## Tab 4

### **LifeSpan Planning Process™**

1. The Definition of Estate Planning
2. LifeSpan™ Planning Pyramid
3. The LifeSpan Planning Process™
4. LifeSpan Three-Step Strategy™
5. The LifeSpan Plan Development Navigator™
6. The LifeSpan Learning Solution™
7. The LifeSpan Legacy Program™
8. The Lifespan Transfer Process Navigators™
9. The Investment Selector/Practice Evolver™
10. LifeSpan Financial Summary™
11. Engagement Letter