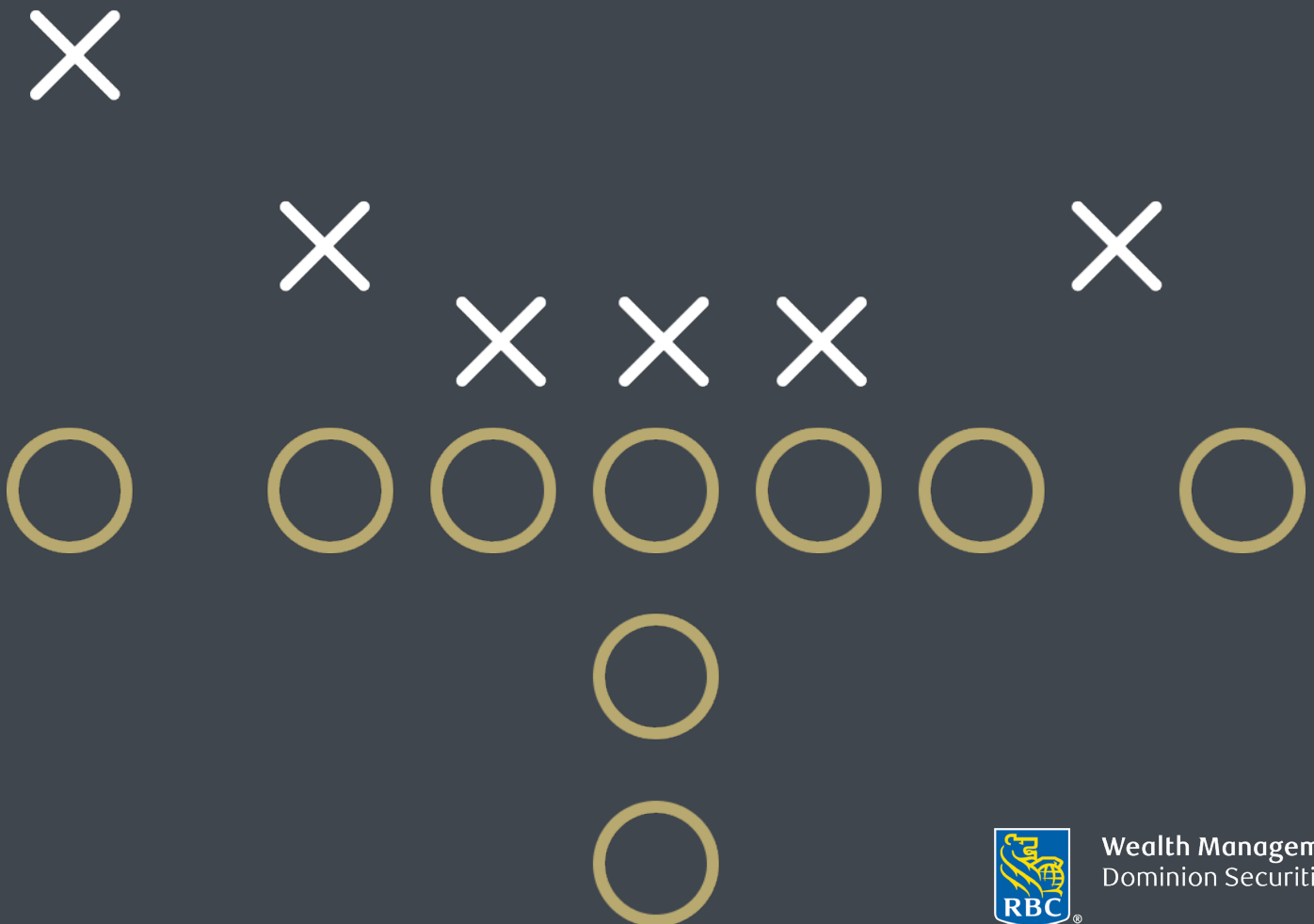
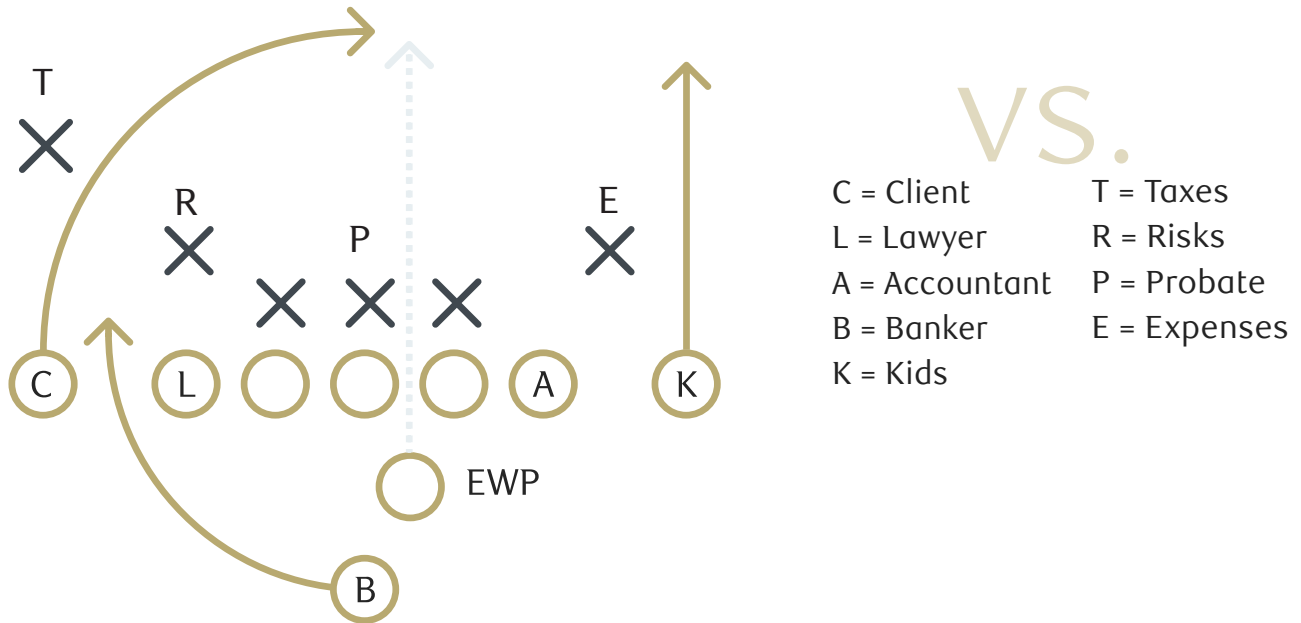


Eydt Wealth Partners

# Wealth Quarterback



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After decades of procrastinating, Steve and Sandra Lloyd finally built up the momentum to get their **retirement planning** in order. Steve was a successful business owner in the construction industry and Sandra a longtime executive of a national IT consulting firm. They had spent the last 25 years building their business, careers, and family and are now thinking about their retirement. But how are they going to fund their dreams of month-long trips to Palm Springs for golf vacations and adventures to the Galapagos Islands, all while being able to help their kids buy their first homes and pay the taxes on the sale of the business? **They didn't know where to start.**

Over the next two months, they reached out to their accountant to understand the **tax implications** of selling the business and their banker about their **mortgage**. They talked to their lawyer and insurance agent about their **estate plan** and their investment advisor about their **portfolio**. After hours of meetings, emails, and phone calls, Steve and Sandra were overwhelmed with segmented information from all of their advisors that didn't jive together. Even though they were extremely successful at their respective jobs, this was all new to them, which left them stressed and frustrated.

While meeting with their banker, they expressed their frustration. Last year, the banker attended a seminar hosted by the **Eydt Wealth Partners (EWP)** on the concept of a **"wealth quarterback"** and referred a previous client to them. Those clients were ecstatic as they now have:

1. **Clarity** around their goals and how their resources will fund those goals.
2. **Stability** of their portfolio so they can count on their resources being there when they need it.
3. **Confidence** that they have a financial plan to attain their vision and a trusted "wealth quarterback" to coordinate *all* the strategies that need to be implemented over time.

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“This is exactly what we've been looking for!” Sandra replied. The banker set-up dates for EWP's **two-meeting process**, the Discovery and Vision presentations. Feeling relieved already, the Lloyds started planning their retirement getaways.