Your BEST Is Yet To Come

Safeguard Investment Advisory Group, LLC
A Registered Investment Advisory Firm

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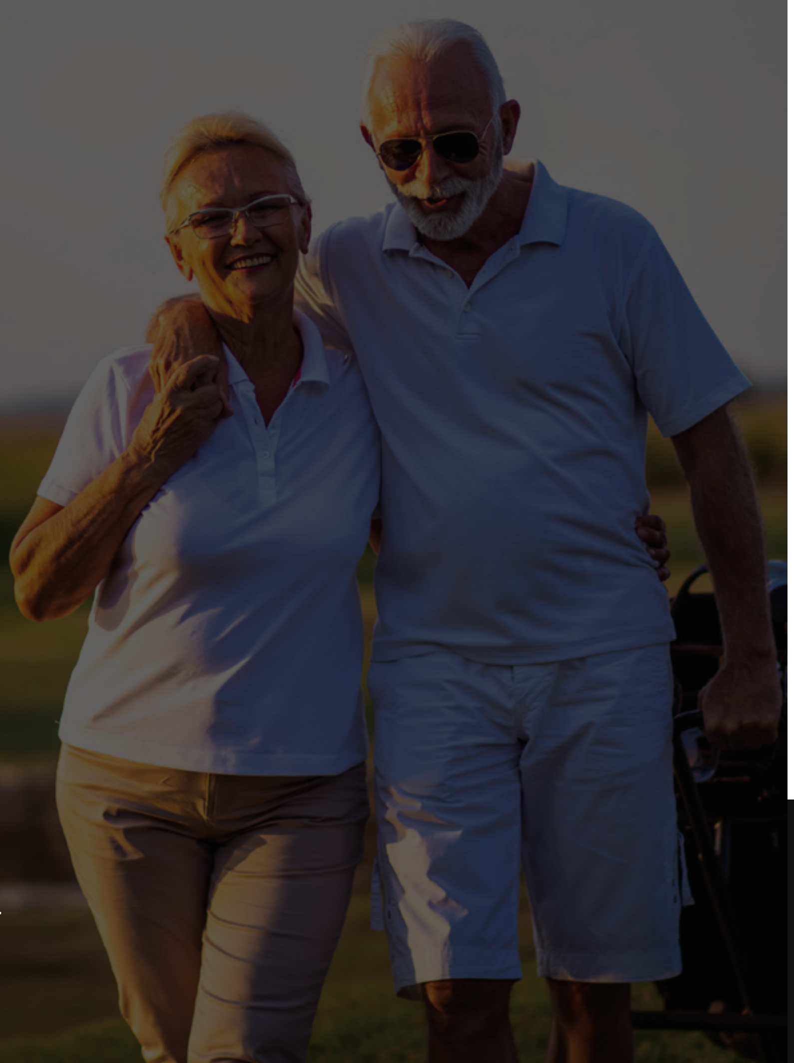

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Let's Begin with the End in Mind

It's a simple fact that, when pursuing any objective, you can never know if you've been successful unless you know what the end result should look like. After all, understanding where you intend to go greatly increases the odds you will end up there. For that reason, every journey, every effort — every goal — should begin with the end in mind.

The same applies to how we live our lives. We all want our lives to have meaning, to know that we served a purpose. What that looks like will be different from person to person, based on individual values and priorities. At Safeguard Investment Advisory Group, we are passionate about helping you fulfill your life's purpose.

We begin by listening, so we can develop a genuine understanding of what matters most to you. Our focus is on helping you develop a financial strategy that can help you to answer "yes" when you look back on your life and ask, "Did I live a purposeful, meaningful life?"

Your Story

As we begin our journey together, it's important for us to understand your story. Where do you find meaning in life? What things are essential to your happiness? What do you hope to achieve?

Only by understanding what you need to be fulfilled and what you want to accomplish with your life can we design a portfolio structure to help you to achieve those things. That's why we've developed this kit; it's the first step in developing your purpose-driven portfolio.

We've included here a brief exercise we would like you to complete and bring with you to your appointment. You might find this somewhat challenging to complete — not because we're asking for a lot of information, but because we're asking you to carefully consider the things that are most important in your life. It's amazing how many people never truly consider, on a deep level, the things that provide real meaning to their lives. We're asking you to take the time to do that because we believe it is essential to helping you achieve the meaningful, purpose-driven life you want and deserve.

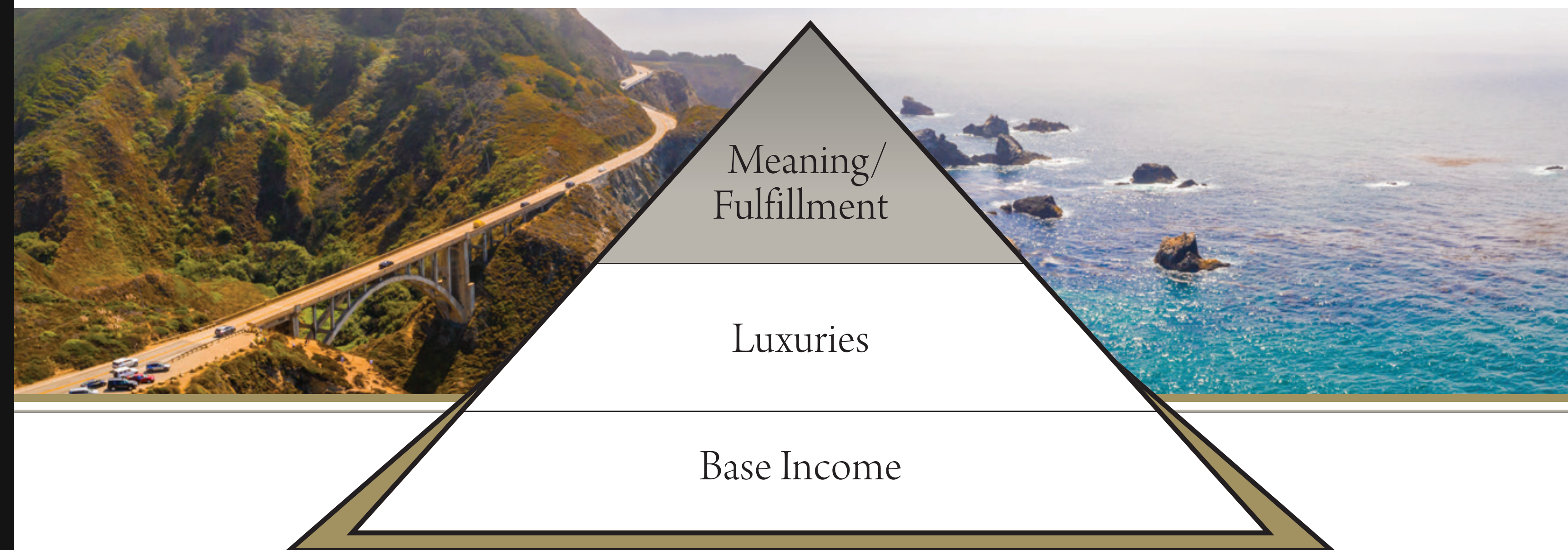
Instructions

Close your eyes and imagine you are on your deathbed. Looking back on your life, what are two or three things you did, or accomplished, that provided you with the most meaning or fulfillment in your life? Was it travel related? Family? Financial security? A passion?

Whatever it was, write it down – one item per line.

Then under each item, spend a moment to write down why it was so meaningful to you personally.

Remember, your assets are nothing more than a tool to help support your pursuit for meaning and fulfillment in your life. In order to appropriately allocate your assets, you need to first be clear on what you want those assets to support.



3 things that provide meaning in your life:

1. ______________________________

____

Why: ______________________________

____

2. ______________________________

____

Why: ______________________________

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3. ______________________________

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Why: ______________________________

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Our firm assists retirees and pre-retirees in the creation of retirement strategies utilizing insurance and investment products. At our appointment we may discuss how those products could fit into your retirement strategy.