# SAGE *Solutions*

## The Mayo Clinic Approach to Family Legacy & Lifestyle Financial Planning

***Sage Hill's Three-Day Executive Financial & Legacy Examination Program*** … a well-organized, communicative program designed to develop an understandable life legacy and financial strategy and action plan. Our program utilizes focused dialogue between our professional team and you and capitalizes upon the continuity drawn from our three consecutive day program.

*We have numerous Sage Hill clients whom have gone through Mayo Clinic's Executive Physical Examination Program…Mayo Clinic's Executive Health Program offers busy executives an efficient, cost-effective way to manage their health and reduce medical absences… In one to three days at Mayo Clinic, you'll receive…a comprehensive medical history review and physical exam by an internal medicine specialist and referrals to subspecialists, as necessary…a full range of preventive screening tests for early detection of cancer, heart disease and other serious conditions…a lifestyle assessment…a full report of your test results…an action plan…the program blends Mayo Clinic's well-known diagnostic expertise with the latest in preventive medicine. Many participants have been diagnosed with a previously undiscovered condition during an executive health exam…Mayo Clinic's executive health doctors have extensive experience in evaluating health risk factors in healthy people and in people experiencing symptoms of illness or injury. These doctors have access to all of the resources of Mayo Clinic and can coordinate your care, if you have multiple health concerns.*

**Welcome to Sage Hill's Executive *Financial and Legacy* Examination Program…**

Sage Hill's Executive Financial and Legacy Examination Program offers busy executives and business owners an efficient, cost-effective way to manage their financial and legacy planning health and reduce the risk of losing your hard-earned wealth… In two to three days at Sage Hill (*or, in some cases, at your location*), you'll receive…a comprehensive financial and estate planning review and goal-setting session with our family coaching specialist and referrals to subspecialists (attorneys, CPAs, life insurance bidders through our Request-For-Proposal protocols, investment bank instruments through our stringent due diligence protocols, valuation experts, etc.), as necessary…a full range of preventive screening tests for early detection of loss of lifestyle financial resources and loss of your business in the event of death and other serious conditions…a lifestyle assessment to match your life plan and legacy plan with your financial resources…a full analytical report of your test results…an action plan…the program blends Sage Hill's well-known diagnostic expertise with the latest in advanced estate planning strategies, premium-saving life insurance RFP bidding process, and lifestyle-preserving investment portfolio 'preventative' medicine'. Many participants have been diagnosed with a previously undiscovered condition during an executive exam…Sage Hill's attorneys, CPA's, and financial professionals have extensive experience in evaluating financial and legal risk factors in healthy people and in people experiencing symptoms of financial illness.


If you would like to forward this article via email, please click here.

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SAGE HILL
Advisory & Management

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Our professionals have access to all of the resources of the Sage Hill Professional Network and coordinate your post-examination implementation and management of your legacy plan, your business succession plan, and your lifestyle-support investment portfolio.

Program Design (subject to variation with each family):

Pre-On site Preparation:

- Sage Hill collects financial data and existing legal documentation
- Sage Hill provides you with a series of questions for you to consider prior to our onsite program (you are *not* asked to *complete a questionnaire* – the effective process requires *dialogue* between you and us face-to-face)

On Site Program (either at our Sage Hill Saratoga Springs, New York home or at your location.

Day One

- Morning
  - Dialogue regarding family, your health, philanthropy, people important to you and issues which you are passionate about
  - What do you want to achieve for the remainder of your life?
  - Do you *feel* secure that you will have the resources to achieve them?
  - How would you like life to function following your death or incapacity for other people who are important to you….your spouse, children-in-the-business, children *not*-in-the-business, loyal employees…?
  - How do you want to be remembered?
  - Etc…more to come…
- Afternoon
  - Professional team meets separately from you to collect our thoughts
- Dinner – You and the professional team to reflect upon the day's discussion

Day Two

- Morning
  - After-thoughts from Day One – Qualitative Issues Discussed
  - Quantitative Introduction By Sage Hill … for example
    - Net Worth
    - Business Value
    - Cash Flow – Current/Future


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- Financial Independence Forecasts
  - While Husband and Wife are both alive and well
  - Contingency Planning
    - Health
    - Business Continuity
    - Financial Markets
    - Liability Exposure
- Afternoon
  - Profesional team meets separate form you to collect our thoughts
- Dinner– You and the professional team to reflect upon the day's discussion

<u>Day Three</u>

- Morning
  - Sage Hill's vision of the marriage of your qualitative life vision and quantitative resources with the strategies, tactics, funding alternatives within existing tax law and the financial marketplace…i.e. providing you with an education of complex issues in layman's terms…and clarity of why and how such strategies make sense for you
- Lunch Together
- Early Afternoon
  - Description of the Sage Hill Action Plan and Timeline for Completion

Program Fee: Provided during our initial conference call (complementary)

Ongoing Monthly Fee: Provided at the three-day program once all facets of your needs and solutions are assessed

***Sage Hill*** *... The Family Office with understandable solutions to complex family wealth issues ...*

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