

THE GUIDED PATH

WHAT YOU NEED
TO KNOW, IN THE
ORDER YOU NEED
TO KNOW IT

8 Seasons, 65 Episodes,
Guiding you start to finish.



Season 1: **Income Planning**

A Dive into Retirement, Social Security, Pensions, and Investment Strategies Across All Ages

Season 2: **Social Security**

Expert Insights on Maximizing Benefits, Spousal Strategies, and Filing Decisions

Season 3: **Investing**

Exploring Investment Strategies Across Stocks, Bonds, Funds, Real Estate, and More

Season 4: **Tax Planning**

Understanding Government Calculations, Retirement Strategies, Investment Taxation, and Common Myths

Season 5: **Estate Planning**

Navigating Wills, Trusts, Taxes, and Family Harmony for a Secure Legacy

Season 6: **Business Owners**

Methods for Structuring, Investing, Exiting, and Networking for Entrepreneurs

Season 7: **Charitable Giving**

Optimizing Impact Through Cash, Stocks, Timing, Distributions, and Strategic Business Exits

Season 8: **Insurance**

Planning for a Secure Future with Health, Life, Long-Term Care, and Property Insurance