

Capita's HIERARCHY OF FINANCIAL PLANNING NEEDS

8.
CHARACTER
ABOVE WEALTH



Financial self-actualization

7. USE WEALTH FOR GOOD



Create joy, opportunity, & impact

6. CHOOSE MY LEGACY



Decide where my wealth goes

5. PROTECT WHAT I'VE BUILT



Prepare for life's "what-ifs"

4. STOP OVERPAYING THE IRS



Reduce tax and keep more of what I earn

3. MAKE MY MONEY WORK SMARTER



Invest wisely & efficiently

2. SECURE MY RETIREMENT



Saving and spending the right amounts

1. BUILD STABILITY FIRST



Escape paycheck to paycheck