

New ways. New answers.

GoalLinkSM

A personal, goal-driven investment system

Traditional Financial Planning: Focus on Investment Dimensions

Most conversations about managing your assets focus on half of the issue:

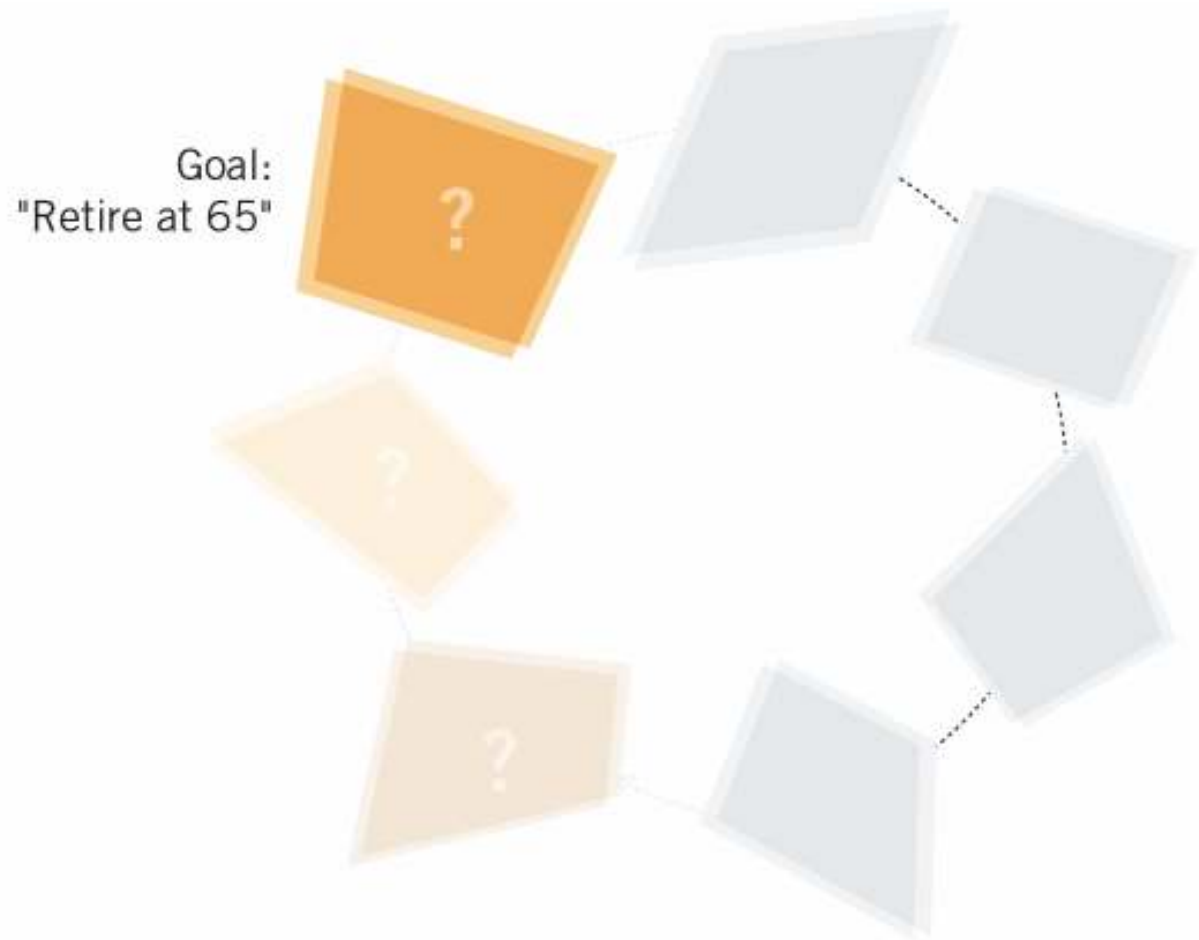
- How much do you have to invest?
- What is the appropriate asset allocation?
- How diversified are your assets?
- How much risk can you tolerate?



Smith Family Example

Typical Financial Plans

You'll need 70% of pre-retirement income to sustain your current lifestyle.



Smith Family Example, continued

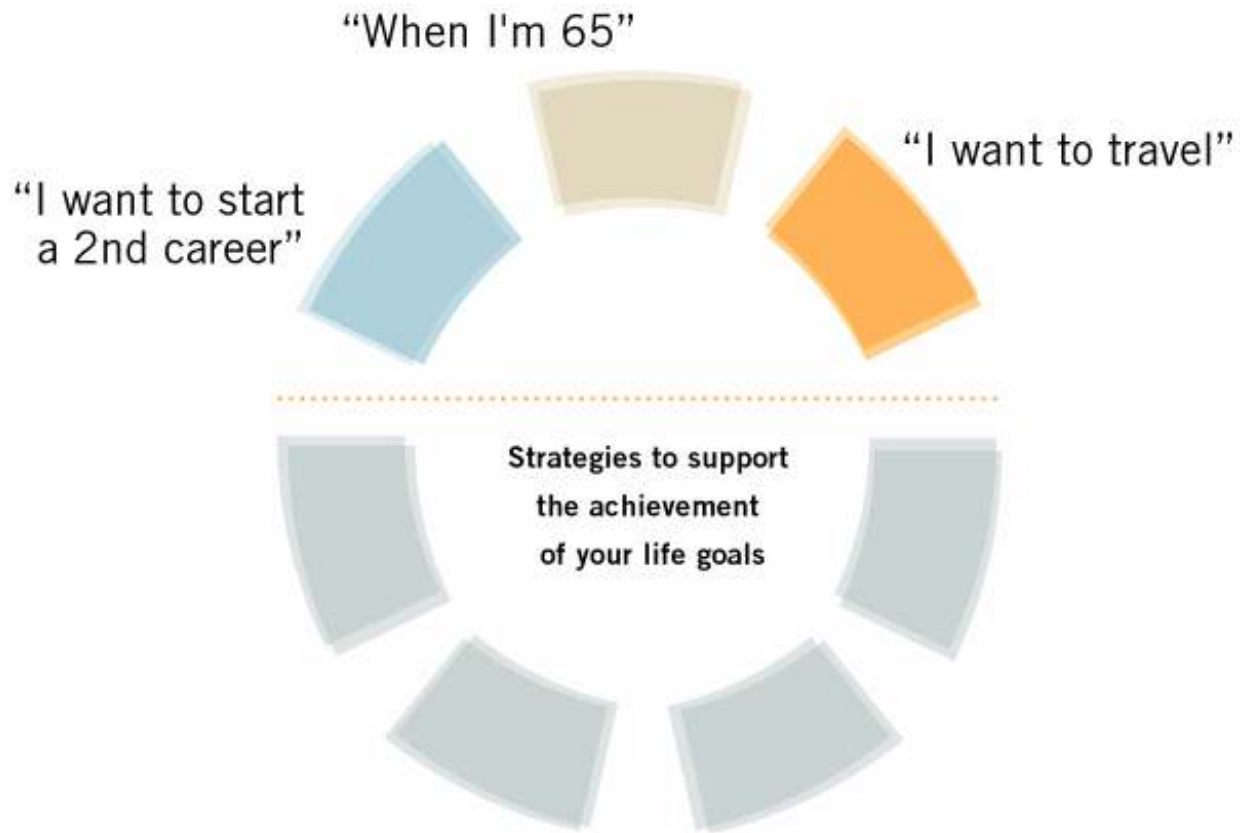
But retirement means many things to many people.



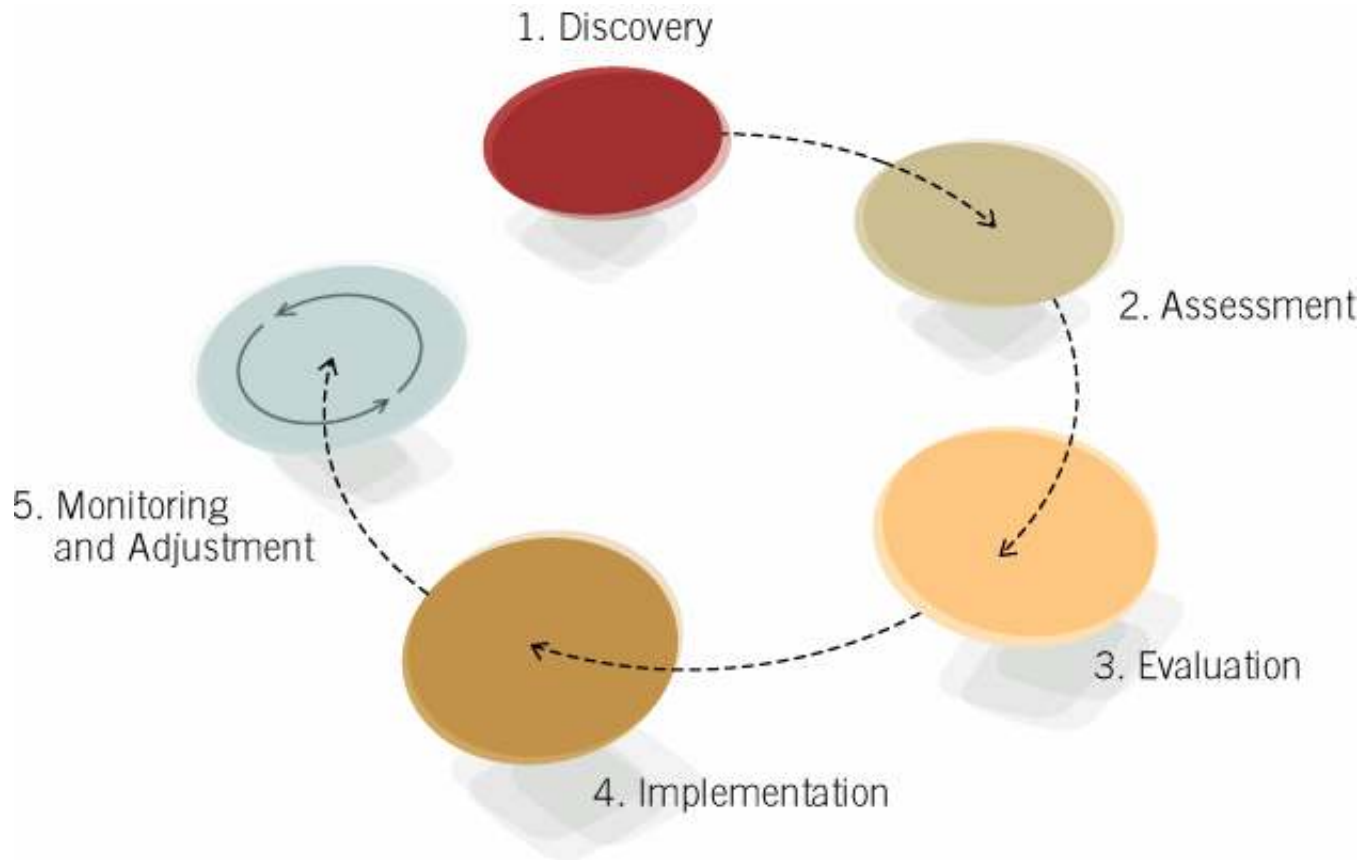
Without considering your real life goals, it is impossible to get the whole answer to your financial well-being

Financial Service vs. Financial Wellness

Fundamental to financial wellness is having an investment strategy that supports your life goals.



Our Five-Step Process



SEI's process is an integrated system for managing your life and wealth

Step 1: Discovery

Lead in the Discovery of Your Life Goals

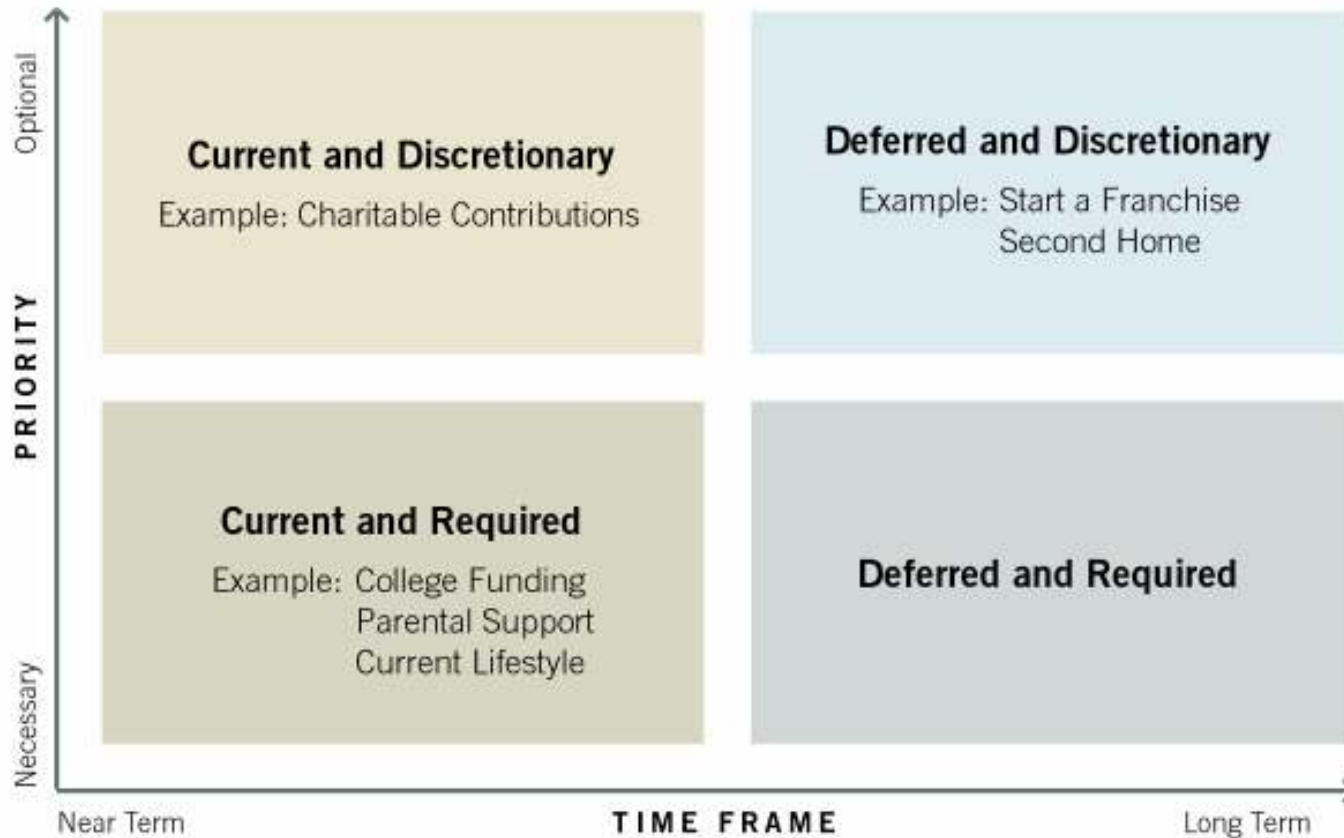
Your goals reflect your personality, aspirations, and dreams for you, your family, your community.



Step 1: Discovery

Organize and Prioritize Your Goals

Once we've thoroughly explored your life goals, we help you organize and prioritize these goals.

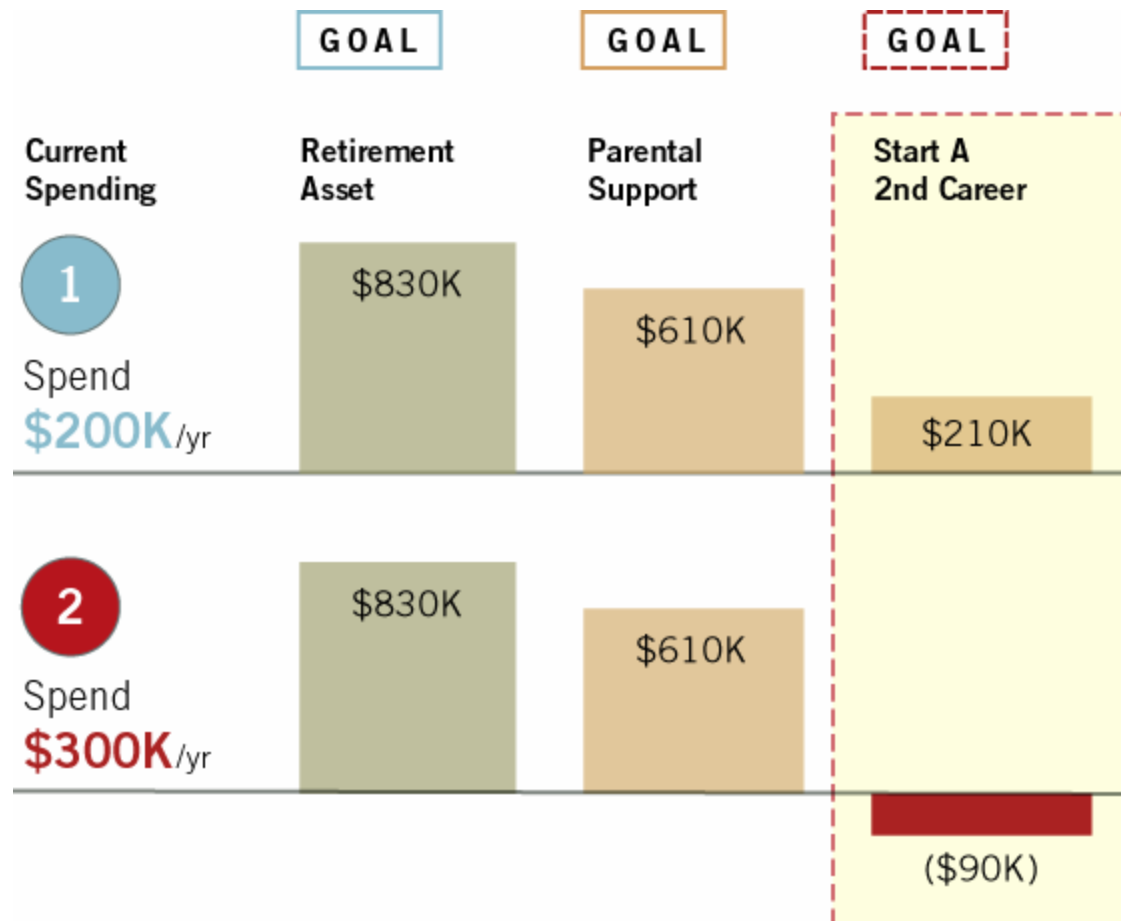


Step 2: Assessment

Discuss the “Real” Risks and Challenges

Life Goals	Real Risks and Challenges
College Tuition	Have I saved enough to meet their tuition expenses? What about graduate school? Will unexpected expenses derail my other goals?
Start a 2nd Career	What if the venture fails? Should I take on that much risk so late in my career? How will a career change affect my pension?
Parental Support	Will I have enough to provide for my parents’ care the way I would like to? How can I gauge against skyrocketing healthcare costs?
Retire at 65 Years of Age	Can I afford to take on new hobbies or travel as much as I would like to? Will my spouse want to retire before me or after me? What if I can’t work to 65? What if my lifestyle increases?

Step 3: Evaluate What Are the Trade-Offs?

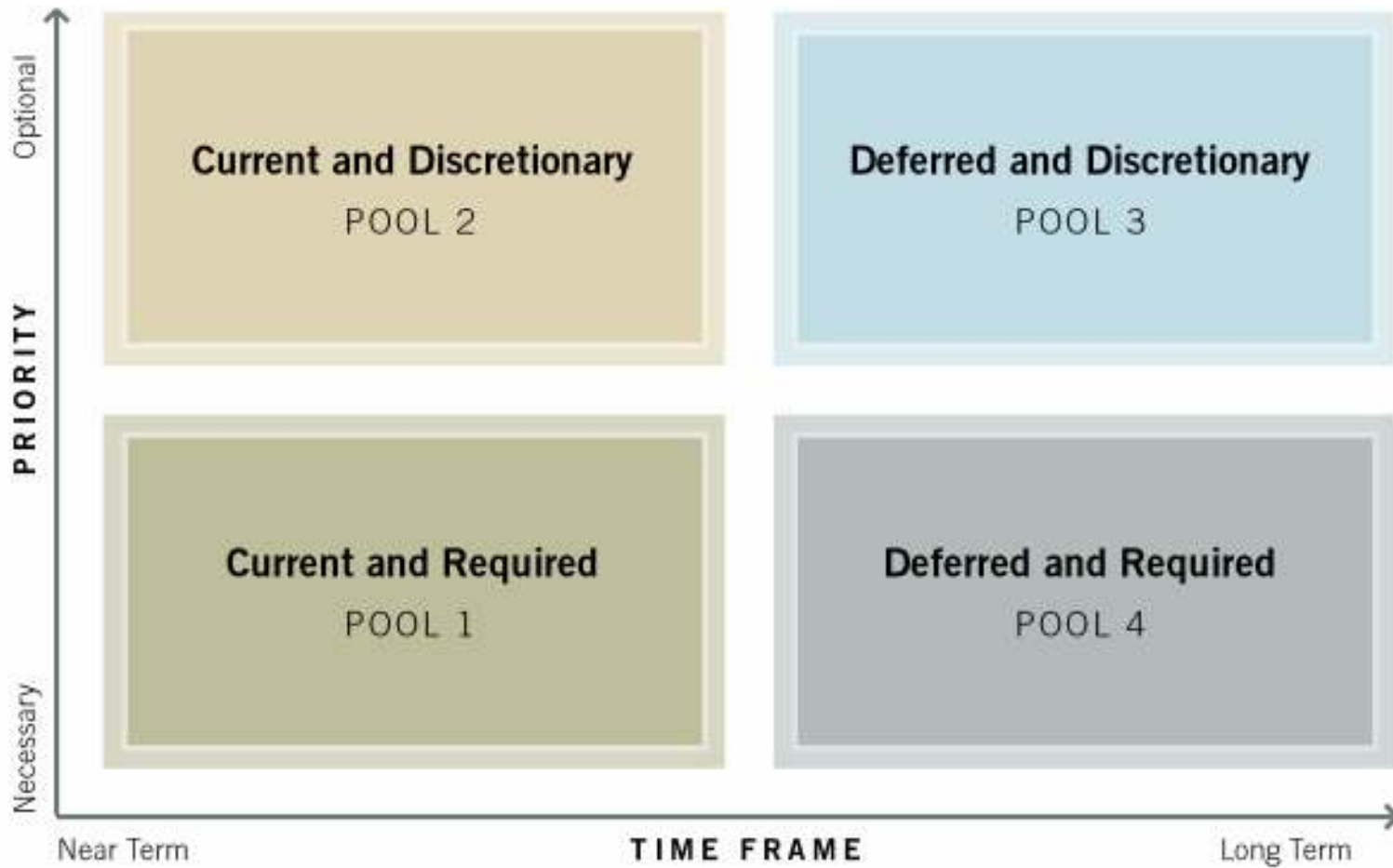


Step 4: Implement

Applying a Strategy to Meet Goals Assessment

Life Goals	Goal/Risk Assessment	Strategy “Fit”
College Tuition	Current, Required	Attractive returns, limited risk of loss
Start a 2nd Career	Deferred, Discretionary	Aggressive growth of assets, long-term focus
Parental Support	Deferred, Required	Attractive returns, limited risk of loss
Retire at 65 Years of Age	Deferred, Required	Grow assets, protect future values

Step 4: Implement the Best Strategy



Step 5: Monitor and Adjust Your Strategy



How It Benefits You

- Simplicity
- Confidence
- Freedom



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There are risks involved with investing, including possible loss of principal. There is no assurance the goals of the strategies discussed will be met. SEI Investments Management Corp (SIMC) is the investment adviser to the SEI Funds and co-advisor to the Individual Managed Account Program (IMAP). Funds distributed by SEI Investments Distribution Co. (SIDCo). SIMC and SIDCo are wholly owned subsidiaries of SEI Investments Company.

Please call me for a free prospectus. Investors are asked to consider the investment objectives, risks, charges, and expenses of investment carefully before investing. The prospectus contains this and other information about the investment company. Please read the prospectus carefully before investing.