





Arkos Tools For Simplifying Wealth

Principles, Priorities, Planning and Preparation Drive the Outcomes in Our Life

		7 STEPS	WORKBOOK	GAP ANALYSIS
	Team Who you count on	Who are you financially?	Key Contacts	Advisor, Estate Attorney, CPA
	Lifestyle What you prioritize	Own Your Future	The 5 Uses & Principles	How Much is Enough?
	Family Business What funds your goals	What's Your Financial Health?	Monthly Burn & Balance Sheet	Strategy & Succession Plan
	Generosity What you support	Tell Your Money Where to Go	The 5 Uses & Goals	Organizations & Causes
	Heir Prep Who is ready	Build Your Roadmap	Clarity Assessment	Key Conversations
	Estate Plan Where it is going	Your Financial World on One Page	Balance Sheet & One Pager	Guidelines & Legal Documentation
	Investments How it is allocated	Pass it on	One Pager & Three Dials	The Three Dials