# You plan the money. *LifeWise plans the life it pays for.*

A client heading into a major transition can answer every question about the portfolio and very few about the life it funds. LifeWise Exit closes that gap and hands you the output: **the LifeWise Blueprint**, a concrete ten-year plan your financial plan can be built around.

## What your client gets

A structured six-month engagement with Cindy Jennings, 1:1 via video, spouse or partner included throughout. The heaviest work happens in the first two months, followed by monthly check-ins and 30/90-day recalibrations. The deliverable is the LifeWise Blueprint: a ten-year plan across eight life areas, plus a Decision Compass for the board seats, ventures, and commitments that come calling after a transition.

## What the Blueprint feeds your plan

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|---|---|
| **TIMING** | When they actually intend to step away, decided rather than assumed. |
| **LOCATION** | Where the next chapter happens: primary home, second home, relocation. |
| **SPENDING** | What the life costs: travel, new ventures, family support, philanthropy. |
| **ALIGNMENT** | Spouse and client working from the same plan, so your projections hold. |

## Three things this does for your practice

### Real inputs for your projections

Timing, location, spending priorities arrive as decisions the client has already made. Your plan models a real life instead of a placeholder retirement.

### A relationship that survives the transition

Transitions are when assets move. A client with a ten-year plan built alongside their spouse, with your plan funding it, has every reason to stay.

### Clear lanes, one message

Cindy advises on the life. You advise on the money. Clients hear the same thing from both of you: the Blueprint is the input, your financial plan is the engine.

**52%**

Barely half of executives entering retirement feel emotionally prepared for it. Their money is usually ready years before they are. The Blueprint closes that gap before it surfaces in your review meetings.

FINANCIAL PLANNING ASSOCIATION, 2025 TRENDS IN RETIREMENT PLANNING

### Start with the Snapshot

Send the client the free LifeWise Snapshot before your next review. About twenty minutes, six dimensions.

**snapshot.lifewiseexit.com**

*"I'm leaving with certainty and excitement instead of anxiety. LifeWise Exit got us there."*

**Mike M.** Waste Management Industry Executive

## See where this fits your book.

A 30-minute conversation with Cindy Jennings, most useful when grounded in a real client situation. Talking points are available, and Cindy will join a client conversation directly where that helps.

**Schedule a Call**

Prefer email first? support@lifewiseexit.com