Stages of Life Transition
Purpose, Method, Outcome
Client Protocol from FTI/SMI

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Four Stages of Transition
From what was to what will be

Anticipation
Ending
Passage
New Normal

Possibilities
Fear
Chaos
“When money changes life changes, and when life changes money changes.”

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Two sides of money

**Technical**
- Taxes
- Investments
- Estate Planning
- Cash Flow
- Risk Management

**Personal**
- Relationships
- Emotions
- Hopes & Dreams
- Self-Esteem
- Sense of Well-Being

Both sides are equally important and complex... but it is the personal side that drives decision-making.

**FLOW**
- Identity Intact
- Clarity
- Hopeful/Resilient
- Realistic About Possibilities
- Refreshed/Energized
- Open/Collaborative
- Focused/Attentive
- Consistent Behavior
- Composed

**STRUGGLE**
- Identity Compromised
- Confusion/Overwhelm
- Hopeless
- Invincible
- Mental & Physical Fatigue
- Numb/Withdrawn/Frozen
- Narrow or Fractured Focus
- Inconsistent Behavior
- Combative
Thank You

For Additional Training and Tools

www.financialtransitionist.com
Thank you