

SAGE HILL

Partners, LLC

“Sage, Safe & Sound A Sage Hill Partners Solution”

Sage Hill Partners is pleased to offer Sage, Safe & Sound...a practical, personalized and cost efficient service for 'the millionaire next door'. This program utilizes the same objective, experience-tested protocols used by Sage Hill's professional team for extraordinarily affluent, successful individuals over the last three decades.

The Sage, Safe & Sound program includes:

Provide Initial Financial Discovery, Diagnosis, & Prescription

- ✓ *Identify and Prioritize Financial Goals*
- ✓ *Document Financial Resources*
- ✓ *Deliver Action Items designed to make progress toward Goals*

Organize and Secure Important Financial and Legal Records

- ✓ *Sage Hill Personal Document Locator*
- ✓ *Sage Hill Virtual Vault Service*

Increase Protection from Risk of Fraud and Identity Theft

Deliver an Annual Financial and Progress Check Up

- ✓ *Help to Ensure Focus and Progress towards Financial Goals*
- ✓ *Identify New Goals as Life and Situation Changes*

Annual fee: \$2,500

Continuous Service: \$1,500

Benefits for Members:

- ✓ *Better understand and prioritize your Financial Goals*
- ✓ *Receive Action Items designed to make progress towards your goals*
- ✓ *Improve Financial Document Organization and Security*
- ✓ *Increase focus and progress on financial goals*
- ✓ *Benefit from a service which provides an assessment of your financial situation delivered by an experienced professional with no conflict of interest.*

To learn more about Sage, Safe & Sound, please feel free to contact Sage Hill Partners