



As you know, we believe strongly in the power of financial planning as a foundation for all we do at Live Oak Wealth Management. We're constantly searching for new ways we can provide more value to you and your family on an ongoing basis. Over the last year, we've spent many hours evaluating, enhancing, and fine-tuning our current processes and we are proud to unveil our new TRAC Financial Planning System.



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THERE ARE FOUR KEY AREAS WE PREDOMINANTLY FOCUS ON AND MONITOR IN TRAC:

T = Tax Planning

This is your MAP [Managing, Anticipating, Planning] to paying less in taxes.

R = Retirement Planning

Together, we set a destination for your dreams.

A = Asset Protection

This is your trac of protection: investment recommendations, income streams, risk management, and proper asset titlin

C = Confidence

Our primary objective in all we do is to give you time and peace of mind to savor life's important moments.

WE DIDN'T CHOOSE THE LIVE OAK TREE TO REPRESENT OUR BUSINESS BY CHANCE. WE CHOSE IT FOR ITS STRENGTH AND ABILITY TO THRIVE—EVEN IN THE MOST CHALLENGING CONDITIONS. ST. CHARLES AVENUE IN NEW ORLEANS IS FAMOUS FOR ITS LIVE OAK TREES THAT LINE BOTH SIDES OF THE 7-MILE STRETCH. DURING HURRICANE KATRINA, ONLY FOUR OF ITS HUNDREDS OF TOWERING OAK TREES DIED DURING THE STORM! LIVE OAK TREES HAVE A UNIQUE SYSTEM OF INTERLOCKING ROOTS UNDERGROUND, WHICH INCREASES THE STRENGTH OF EACH INDIVIDUAL TREE EXPONENTIALLY.

WE BUILT OUR TRAC SYSTEM TO DO THE SAME. OUR FOCUS IN THESE FOUR CRITICAL PLANNING AREAS IS DESIGNED TO GIVE YOU A SYSTEM OF INTERLOCKING ROOTS THAT STRENGTHENS YOUR FAMILY'S FINANCIAL FOUNDATION DURING THESE VOLATILE TIMES.

WE'RE EXCITED TO SHARE OUR NEW TRAC SYSTEM WITH YOU AND WE'LL BE IN TOUCH SOON. FEEL FREE TO REACH OUT IN THE MEANTIME WITH ANY QUESTIONS OR IF WE CAN HELP IN ANY WAY.