

TYPES OF FINANCIAL CAPITAL

LIFESTYLE	INVESTMENT	BANKING	SOCIAL
<i>FOCUS: Control</i>	<i>FOCUS: Growth</i>	<i>FOCUS: Opportunity</i>	<i>FOCUS: Control</i>
<p><i>First Home</i></p> <p><i>Second Home</i></p> <p><i>Expenses</i></p> <p><i>Insurance</i></p>	<p><i>Investments</i></p> <p><i>Retirement</i></p> <p><i>Real Estate</i></p> <p><i>Family Business</i></p> <p><i>Stock Options</i></p>	<p><i>Mortgages</i></p> <p><i>Business Opportunities</i></p> <p><i>Credit Lines</i></p> <p><i>Family Bank</i></p>	<p><i>Taxes</i></p> <p><i>Charitable Donations</i></p> <p><i>Foundations</i></p>
Estate Planning			
Inter-generational Wealth Transfer			
<i>EDUCATION FUNDING</i>	<i>TRUSTS</i>	<i>PLANNED GIFTS</i>	