

## Scott Brooks Video Transcripts

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SCOTT: You want a plan that allows you to access your portfolio in a tax-efficient manner, right? We want a plan that properly handles all of your insurance needs and any health care issues that you may have now or in the future, especially if you choose to self-insure. We want a plan that ensures neither of you can outlive your income. We want a plan that helps to review your estate plan to ensure it properly and cost-efficiently disperses your assets to your three daughters and your grandchildren. Again, after you've live a long, full life. Let's not give it to them too soon. And protects you both in case either one of you become incapacitated, all right? And then, finally, Item N here; Item N is really important. I'm going to read it to you and I'll going to tell you what I'm thinking here. Ultimately, we want a plan that consolidates and coordinates everything into one organized plan, so that you know you can maintain your current lifestyle for the rest of your lives. When I was meeting with you guys a couple weeks ago, and I was interviewing you, and I wrote all these notes, one of the things that kind of jumped out at me is this: I get the impression that you guys, you're basically happy with the life you have, right? You enjoy yourselves, right? You're happy in

your own skins, right? You're happy in your own skin. So, as I put this plan together; I mean, look; you guys could go out and become Donald Trump if you wanted to, for a month or two, but then you're out of money, right? But I don't think you want that, do you? You're happy with what you have. Fair statement?

ROY: Uh-huh.

PATTY: Yes.

SCOTT: So, as wrote the plan, this is what I had in mind. So, I want you to remember this is Item N. I want you to remember this is. As I wrote this plan, my thought process was on maintaining your current lifestyle for the rest of your lives, okay? That's what I'm focusing on, okay guys? Does that seem like a reasonable focus for me to have?

ROY: Right.

PATTY: Yeah.

SCOTT: Okay, very good.