



The Master's Program

by **OASIS**
wealth

Defending Your Financial Position From
Erosion, Misinformation And You!



The Philosophy

At Oasis Wealth we think and design "out of the Box" compared to traditional planning. First, you will learn how we have a revolutionary Game Board, Rulebook, and our role as Your Personal CFO. You will have a foundational understanding of our philosophies and how we will revolutionize the way you think about finances! You will be sent an introductory package to complete with the next steps.

Your Data Dive

We always require that all data be presented to our office a minimum of 48 hours before our next meeting, saving you valuable time during this meeting. We will go through in detail all the areas for which you have already started to build your financial economy.

More importantly, we will review what you want for your money. If you don't plan to spend it all today, then it has to have a future purpose! DREAM BIG!



Your Defence Game Plan

"Offence wins games, but defence wins championships". This is why we address every area of your defence first. The goal here is maximum protection for minimum cost. *(Cost= money you put into your financial world with little to no expectation of getting it back). We review your savings rate and debt structure; as these are KEY components to your financial Integrity.

Your Offence Game Plan

Now we move to an area of finance that everyone likes to focus on prematurely, GROWTH! The objective here is MAXIMUM growth with minimum risk, maximum freedom and spending power. We will complete a detailed investor profile to ensure your investment strategy is on par with your ability to handle volatility. Every investment growth decision is made in light of your desire to either spend it or give it away in the future. Ultimately that's what everyone does with their money.



It's Game Time!

Working together to implement strategies, your family will achieve maximum financial success. A strategy with no follow through is useless! We will assist to facilitate in any area that requires implementation outside of Oasis Wealth. While it is not a requirement to move any past financial decisions or products to Oasis Wealth, most do!

Alumni Circle

In the first year of the Oasis Master's Program, you can expect us to check in regularly. Reviews are quite simple unless there have been significant life changes. We commit to meeting at minimum once a year, however your desired method and frequency of contact is left up to you. Plus, there are alumni rewards and community service opportunities throughout the year which you may be eligible for!



Pay It
Forward



Protect, Grow, Enjoy!

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