

# Helping You Live... Your Exponential Life

The  
**LEXINGTON**<sup>™</sup>  
360 Alliance

*Strategies for Exponential Life*

**Dale E. Veitch, CIMC<sup>®</sup>**  
Founder and Chief Executive Officer



*"In addition to financial growth, is the growth of the human potential as Lexington guides the owners of closely held businesses and their family members through the process of embracing risk and capturing opportunity. Our objective is to unlock the value of your business, build wealth, and preserve family values for generations to come."*



**In today's changing world,** closely held and family-owned businesses face challenges and opportunities for both their liquid and illiquid wealth. Lexington provides comprehensive financial life management with our collaborative network of independent professionals. Our clients seek to achieve Exponential Life through a continuous journey of improving all aspects of their business, family, and finances in a world of constant change.

**Lexington Financial Life Management** is a team of diverse professionals who are committed to working together to find the very best comprehensive solutions for our clients. We bring our collective skills and experience, along with that of our Alliance Members to provide a 360 degree solution platform. This solution-based focus means that the business owners that work with us feel confident in knowing that expertise is shared within our team so that one solution doesn't create problems elsewhere in your plan. We look at all aspects of your situation in an effort to determine the best combination of preferred outcomes in your holistic Financial Life Ecosystem.



## Strategies For Exponential Life<sup>™</sup>

*Exponential Life is an objective unique to every individual. It is a continuous journey to grow and thrive by improving all aspects of business, family, and finances in a world of continuous change.*

*Lexington, together with our collaborative team of independent professionals, provides comprehensive strategies to solve complex problems with real-life solutions.*

## ABOUT OUR ALLIANCE

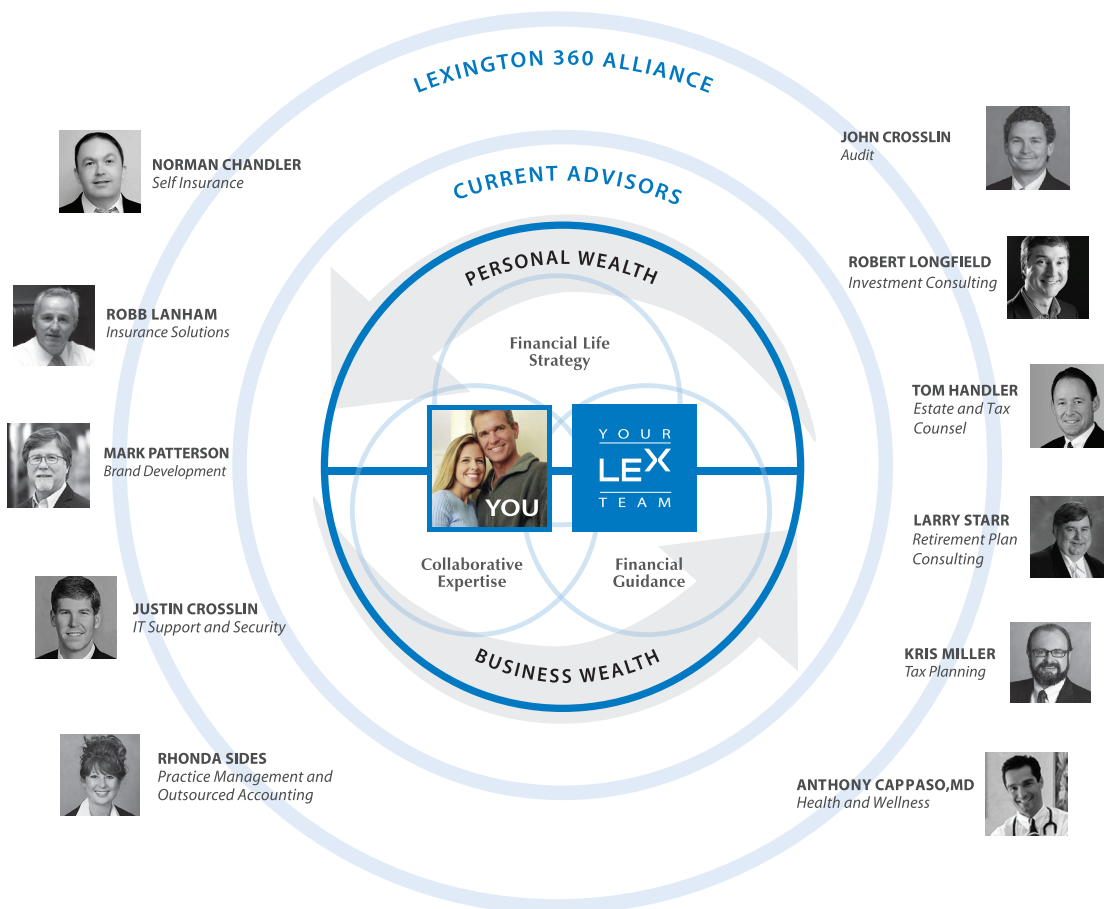
To achieve Exponential Life, you need exponential thinking. To help our clients pursue Exponential Life, Lexington Leadership has assembled a team of diverse, niched, and vetted independent professionals who are available to work collaboratively with you and your existing advisors to provide 360 degree guidance and management to address the broad spectrum of business and financial life needs. Each contributor brings specific insight and experience that when combined, forms a collective powerhouse of ideas and innovation. Lexington serves the needs of independent business owners, highly successful individuals, and families by providing the right people, the right technology, and the right processes to solve the complex problems of business and life in today's changing world.

### FINANCIAL LIFE STRATEGY

We provide financial guidance operating as an independent consulting firm. Our collaborative model involves insight and review of a team of independent experts who contribute their own ideas and add to the discussions regarding the development and implementation of strategies that include both liquid and illiquid assets. This interactive dialog provides a wealth of valuable input as well as an added layer of analysis.

### COLLABORATIVE EXPERTISE

Our collaborative team of independent professionals has extensive experience across a broad spectrum of services. Each has developed their own proprietary process and procedures to address the complex situations that clients experience today. Together, this intellectual capital allows the Lexington 360 Alliance to surround our clients with unique solutions and proven methodologies. We are a group of innovative thought leaders who bring our combined talents to serve our clients with a deep bench of capability and visionary guidance.



The  
**LEXINGTON™**  
360 Alliance

### FINANCIAL GUIDANCE

*At Lexington Financial Life Management, we believe that your wealth is an ecosystem and certainly more than just your liquid assets. Our approach looks at all of your assets comprehensively to ensure that your assets are aligned with your goals. Our team of professionals work together to provide:*

- Collaboration and Coordination with Internal and External Advisors
- Financial and Estate Planning
- Business Planning and Valuation
- Business Audits
- Bill Payment and Financial Reporting
- Wellness
- Investment Consulting Private and Institutional
- Asset Preservation
- IT Support and Security
- Insurance Consulting and Captive Solutions
- Charitable Planning and Giving
- Consolidated Wealth Reporting
- Debt Structure Analysis and Negotiations
- Retirement Plan Formation and Administration
- Elder Care Consulting
- Performance Reporting on Liquid and Illiquid Assets
- Tax Planning and Preparation



Helping You Live...  
**Your Exponential Life**

**LEXINGTON™**  
FINANCIAL LIFE MANAGEMENT

615.492.1011  
[Team@LEX-Life.com](mailto:Team@LEX-Life.com)  
[www.LEX-Life.com](http://www.LEX-Life.com)