

Transfer Wealth

As your wealth grows, so does the opportunity to enrich the lives of others. Find causes that call to you, are managed with integrity, and actually create impact. Be a wise steward of your resources so you are free to give of your time and energy to causes and people you care deeply about.

“The goal with wealth is to live in a space of outrageous generosity.”

—Dave Ramsey



What are your top 5 values in life? How can you keep your money aligned with these values? Stay focused on what matters most.

- 1 _____

- 2 _____

- 3 _____

- 4 _____

- 5 _____

HEALING HANDS

Tip

Giving to the dōTERRA Healing Hands Foundation® assures 100% of proceeds are used for meaningful humanitarian aid throughout the world. Donate with every LRP order and encourage your team to do the same. Participate in Healing Hands humanitarian trips to experience serving in developing parts of the world. When you donate \$5,000+ you are able to direct funds to specific projects you desire to support.

WEALTH MANAGEMENT SUPPORT CHECKLIST

- Have the right financial support team in place.
- Meet with your accountant quarterly to plan, strategize, and manage tax obligations as your business grows.
- Review your comprehensive financial plan at least annually with your financial advisor.
- Create an estate plan with the help of a qualified specializing attorney. Address issues such as providing for loved ones, inheritance, asset protection, and potential estate taxes.