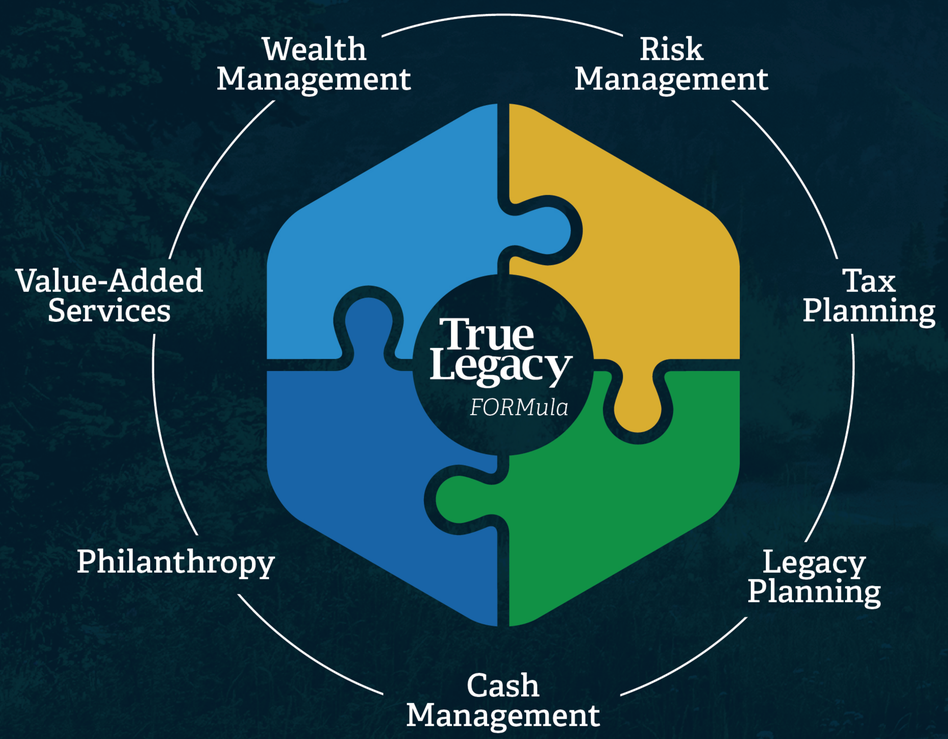
Our Approach

An Enlightened Philosophy
around financial solutions.

A Planning Strategy
that remains fluid and dynamic.

Our Proprietary Process...

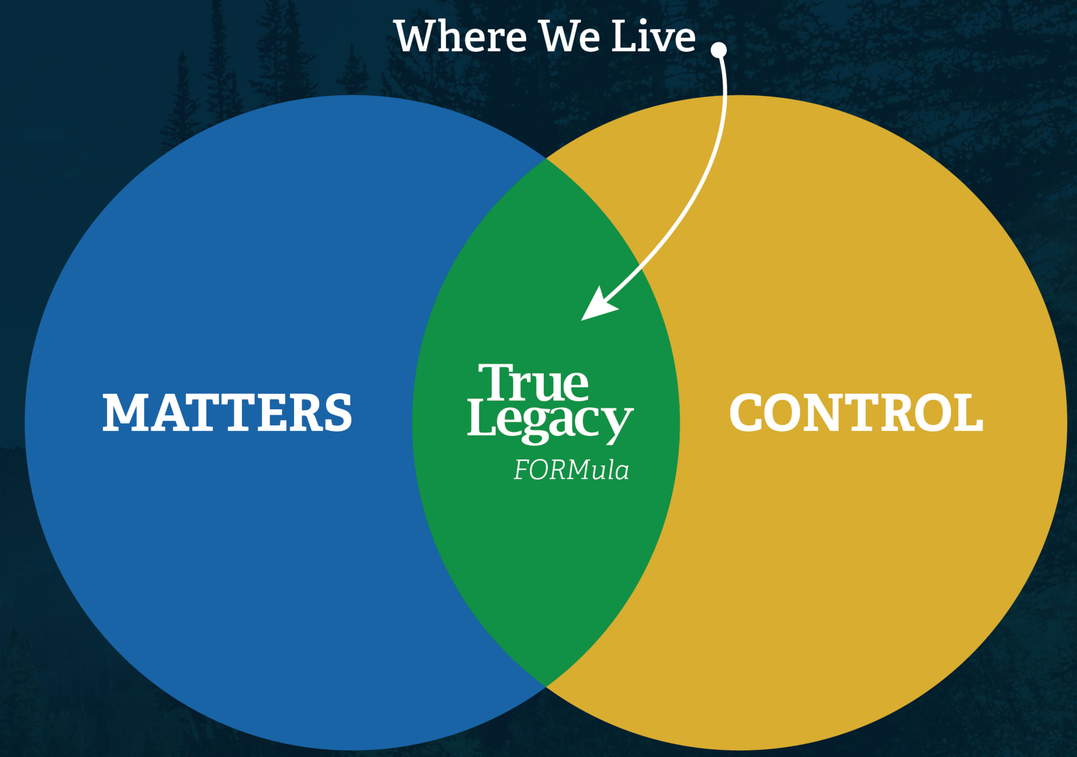
The True Legacy Formula



*Additional Services available for a fee through Principal Securities Inc. Registered Investment Advisor.

It's not just about business or investments, but connecting the dots so that at the end of the day, you leave this world a better place.

True Legacy Financial & Insurance Services



Why — Family, Occupation, Recreation

How — Money

Philosophy
Planning Strategy
Process

Discover
Design
Deploy