



# Archetype Wealth Principles



## Develop Your Principles

Transcend time by sharing your vision (mission, vision, values) to create unity.



## Invest in a Full Inheritance

Provide a real inheritance that consists of the Five Capitals: Intellectual, Character, Relational, Financial, Spiritual



## Steward not Owner

Gratitude is a known antidote for entitlement. Wealth does not equal identity or security and we should have the understanding that money is a tool not a solution.



## Disinherit the IRS

Define your desired financial generosity and give gratitude by understanding the Kingdom vs. world estate plan



## Simplicity Wins (KISS)

Complexity is the enemy of execution. Simplicity is the key to clarity and efficiency. Find ways to stay in your lane and Keep It Simple Steward.



## Evidence Not Opinion

News exists to sell ads and generally leads to a cycle of anxiety. Objective data applied to your investments can help you to think long term.



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## Have a Written Plan

Achieving your goals starts with writing them down and referring back to them often.



## Deliver Blessings

Tell your story by sharing the struggles that made you who you are and allowed you to share your excess with the next generation.



## Empower, Don't Control

Listen and love equally while treating uniquely. Healthy conflict can be good when you maintain neutrality.



## Don't Quit

Life is about the journey not the destination. Plan for how you want to Re-tire vs. retire.



## Life is a Team Sport

Surround yourself with wise counsel and mentors. God is the team captain. Listen, support, and enjoy those around you.



## Have Fun Together

Celebrate life, success, and failure with those around you.