

Steps for a Worry-free Financial Future

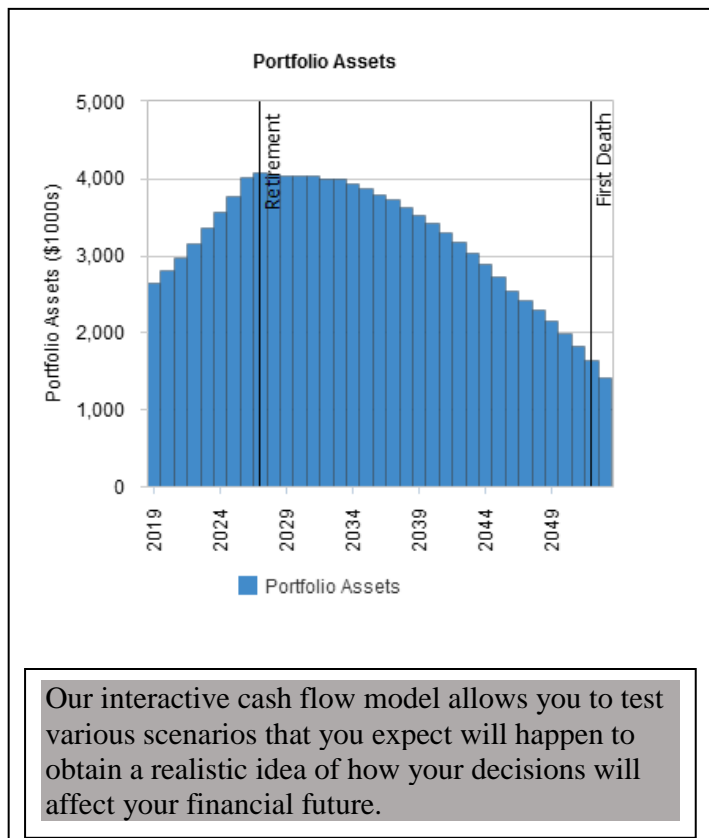


At Lucas Capital we want to provide you with the tools and services you need to prepare for the financial future you envision. We can help you create a personal plan that fits your needs. Organizing your finances can be intimidating, however, we made a simple survey for your convenience. After the questionnaire is complete, we will work with you to develop a strategy you can use to reach your financial goals.

We want to help you understand your financial situation and maximize your wealth, so you can enjoy your retirement. Our goal is to create a plan that you are comfortable with, while working to maintain a long-term relationship with you.

The first plan we create will not be our last. We will update it periodically for your changing goals and life events. Having a full picture also helps us make the right decisions while managing your finances. We understand that your time is valuable, and planning is not what most people would find exciting. However, by preparing now you will minimize the time spent worrying about the future.

With the information you give us, we can create reports that will help you visualize your financial situation and see the potential in your investments. Our interactive Cash Flow Model is one of the features our clients find to be most valuable. With this tool, you can view the many different scenarios and opportunities that may occur. The graph allows you to see your financial future such as when you can retire, how you can finance your child's education, or if you can afford a new vacation home. Preparing for your financial future is now easy and efficient.



Ask

- Picture your ideal retirement lifestyle. How will you finance your future?
- Start by answering our short questionnaire so we can better understand your financial situation and how we can best meet your needs.

Questionnaire

What assets do you currently own?

- Investments at Lucas Capital and at other financial institutions
- Pension Plans, 401(k)s
- Primary Home, other properties and mortgages

What are your sources of income?

- Salary, bonus expectation, stock/option incentive programs
- Trusts and other income sources

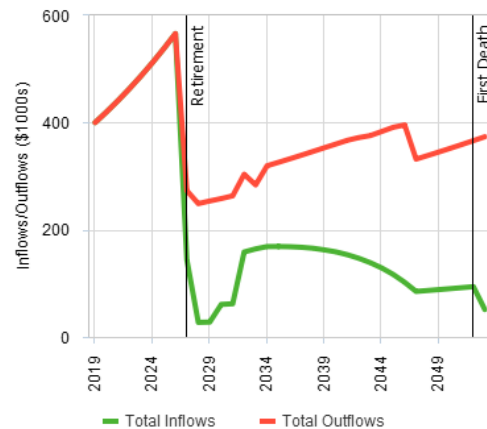
What are your main expenditures?

- Housing expenses, mortgage, taxes, utilities, maintenance
- Vacation, club expenses
- Taxes: real estate, income
- Health care – current and future

Plan

- Future income, expenses, and investments are projected according to your assumptions and helps you understand how your portfolio is expected to change.
- We can use our tools to visualize various decisions and their impact on your future.

Inflows and Outflows



Retire

- Our goal is to help you understand your investments and feel comfortable with your financial situation.



Please let us know how we can help.