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## **How Do Attorneys and Wealth Advisers Work Together to Provide Family Office Services that Solve the Planning Puzzle and Answer the Following Six Questions?**

**1. Lifetime Income Tax Planning:** Does your planner help you generate more after-tax income from earned and investment sources?



Wages	Interest Income	Divided Income	Rents/Royalties	Capital Grain Income	Pension/IRA Income	Tax-Exempt Interest	RE/O&G Income	Tax-Exempt Bonds	Roth IRAs	Tax-Free Insurance Income	Cash from Tax Deductions
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Worst Income Source on Left Best Income Source on Right

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