

# Wealth Management Strategies



## Stage 1: Set Your Wealth Foundation

- Set Goals And Develop Habits
- Manage Risk
- Understand Cash Flow



## Stage 2: Start Building Wealth

- Leverage Your Knowledge And Assets
- Create An Investment Portfolio
- Rebalance Your Portfolio As Needed



## Stage 3: Preserve Your Wealth

- Conduct Ongoing Financial Planning
- Monitor Your Spending
- Manage Your Sequence Of Returns



## Stage 4: Prepare To Transfer Your Wealth

- Create/Update Your Estate Plan
- Develop A Philanthropic Strategy
- Business Succession Planning

# How To Create Manage Wealth Using Business Tools And Techniques

**Zhe Xu**



## **How To Create Manage Wealth Using Business Tools And Techniques:**

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