



July 22, 2020

In your opinion, how much money does it take to be considered "wealthy?"

Is it \$1 million? \$5 million? \$50 million?

In my experience, it's none of those. Your answer is often a number that is *just beyond* whatever you have: similar to a mirage that you never quite reach.



I know someone with \$2 million in 2002 who said to me, "If I can just get to \$5 million, then I will feel more secure".... now, almost 20 years later, they have \$15 million, and not much has changed.

Instead of focusing on a specific lump sum number, focus on your strategy to produce passive income once you are no longer working.

What level of income will keep you comfortable? How much of your investment income would you like to be steady and fixed versus variable? How much of your investment income will be tax-free? Is your current strategy more focused on growth or on income?

If you'd like to talk through these questions with a team of certified [fiduciaries](#), click the blue button below to schedule a conversation with us! We are here to help.

p.s. Who wears a suit jacket while flying on a private jet with his family? Seems ridiculous...

Sincerely,

Chad W. Willardson
WEALTH ADVISOR FOR ENTREPRENEURS

Certified Financial Fiduciary®
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Schedule a Call

