



For Immediate Release

Media Contact: Michael Beightol
Coyote Marsh & Associates, Inc.
847.277.7353
{mbeightol at coyotemarsh dotcom}

LifeAuditorsSM Offers Unique Planning & Evaluation Service That Examines the Totality of Personal & Professional Planning

Long Grove, IL (February 29, 2012) – Baby Boomers are notorious for keeping secrets, says Paul Katz, founder of LifeAuditorsSM, Inc., a new fee-based consulting service that examines the totality of personal and business planning tools. It’s because of those secrets that Baby Boomers are typically ill-prepared for whatever curve life may throw them.

“We live hectic lives in an often troubling world,” Katz says. “Sometimes all we really want is somebody to lean on with an objective, unbiased point-of-view. Family and friends are great, but usually they lack the experience and perspective we need. Professional advisors are key, especially those without bias and the ability to take a horizon-wide view.”

No matter if you are a Baby Boomer or a member of the Greatest Generation, a life audit is an exceptional tool that involves having a LifeAuditorsSM counselor challenging you while helping address a variety of concerns, all while being non-judgmental. “Our clients tell us that this results in a lasting relationship that is built on trust,” Katz says.

The Four-Steps Involved in a Life Audit

The life audit process is a financial and personal check-up conducted on a fee-basis. LifeAuditorsSM are an impartial, independent third party whose only goal is to help clients start anew based upon an entire set of facts. The process is a comprehensive review involving just four steps:

1. Holding an initial consult to gauge the current state of a client’s life and/or business plan.
2. Reviewing existing documents, including:
 - Personal and corporate tax returns
 - Wills
 - Trusts
 - Estate Plans
 - Buy-Sell Exit Strategies



- Retirement Plans
 - Pre and Post-Nuptial Agreements
 - Special Needs Plans (for dependents)
 - Blended Family Plans
3. Preparing an audit that pinpoints areas of strengths and weaknesses to create a comprehensive LifeAuditors plan document.
 4. Communicating the plan, if appropriate, to financial and legal advisors to ensure everyone is working together to achieve objectives and goals. LifeAuditorsSM is happy to make referrals to other professionals if clients need legal and/or financial planning assistance.

“Since a sizeable share of our business is referred by accountants, attorneys and financial planners, we are very experienced at working closely with our clients so that they hear the whole truth,” Katz says. “From our perspective we earn our clients’ trust. Not surprisingly we are told that LifeAuditorsSM has no appearance of a hidden agenda nor do we make preconceived judgments.”

About LifeAuditorsSM, Inc.

LifeAuditorsSM provide a comprehensive, independent assessment of personal and business objectives that includes analysis of corporate and personal tax returns, wills, trusts, buy-sell agreements, retirement plans, insurance, pre and post-nuptial agreements, special needs arrangements for dependents, blended family planning and personal exit strategies. LifeAuditorsSM consulting services are on a fee-basis only; no products are ever sold. To learn more, visit www.lifeauditors.com to schedule a complimentary consult.

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