

# CREATING AND PASSING ON INTER- GENERATIONAL WEALTH

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## PLANTING SEEDS

Wealth can be defined in many ways, for instance one can be wealthy if you have your health and happy family

Ways to create and ways to protect and pass on for future generations, rebuilding our economies





## INTER-GENERATIONAL WEALTH CREATION

### MONETARY

This is the most simple way to create wealth through savings of cash—liquid cash—in a bank you can expect 2-3% ROI

### ASSETS—BEYOND CASH

Property, such as allotments, homes, CD's, Stocks, Bonds, Pensions, IRA, 401K

### HEALTH

One of America's largest cost is healthcare, by eating healthy and indigenous foods, you can help reduce those costs on your family, plus live longer to pass on the wisdom you gain each year



## ECONOMIC DEVELOPMENT



SXAA's purpose is "[t]o assist and educate the allottees and landowners of allotments on the San Xavier Indian Reservation with respect to retaining and improving their lands and their economic well-being and to assist the allottees individually and as a group to deal with land related concerns including environmental protection, water rights and economic development."

# GROWTH STRATEGY

How we'll scale in the future

INVEST

Direct Investments (risky), invest in CD's (least risky), stocks, bonds, tax liens (less risky)

CREATE

Build your own business, what nagging idea do you have that can generate revenue

DEVELOP

Land leasing is a fairly safe way to generate money through BTS; developing on land and renting out can be risky but also generates decent ROI





IS IT GREENER?

## MINDSET SHIFT

We live in a world of abundance, stop thinking in terms of scarcity

## LAW OF ATTRACTION

Your thoughts create your reality, choose wisely; focus on what you want and not on what you do not want

## DESIGN

Imagine and visualize the life you want to live and take active steps to achieve it



# WILLS AND PROBATE

## WILLS

Legal documents that embody the Testator's Final Wishes regarding the distribution of their wealth

## INTER-VIVOS GIFTS

The act of giving while still alive, process that can be used to avoid Probate for your family and friends

## PROBATE

Lengthy legal process by which Courts or BIA will Order the transfer of a dead person's name on an asset to another person's name

## TRUSTS

Creating a quasi entity that will hold "title" to assets for the benefit of person(s); another way to avoid Probate

# SUMMARY

SXAA can assist you in both the wealth creation and transfer of your wealth for the generations to come





THANK YOU

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