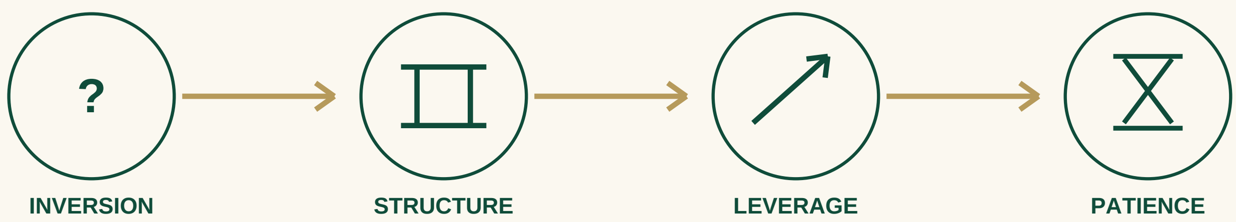
OakTree
STRATEGIC LEVERAGE

THE INVERSION WEALTH FRAMEWORK™

A Different Way to Think About Financial Decisions



= BETTER OUTCOMES™

What could cause a good financial plan to fail?

Start there.

Created by Jim Barlow

Founder, OakTree Strategic Leverage

Structure Determines Outcomes™

START WITH FAILURE

What Could Cause a Good Financial Plan to Fail?

Before focusing on opportunities, first identify what can destroy a plan. These are the vulnerabilities that can derail even the best intentions.

1 EARLY LOSSES & SEQUENCE RISK

Large losses early in retirement can have a lasting impact.

2 EMOTIONAL DECISIONS

Fear and greed can lead to poor timing and costly mistakes.

3 UNPROTECTED LEVERAGE

Too much leverage without protection can magnify losses.

4 LOSS OF TIMING CONTROL

Being forced to act at the wrong time can be costly.

5 TAXES

Taxes can quietly erode returns and reduce what you keep.

6 INFLATION

Inflation reduces purchasing power over time.

You don't have to predict the future to prepare for it.

You just have to design for what could go wrong.

THE INVERSION WEALTH FRAMEWORK™

A FOUR-PART PROCESS FOR BETTER OUTCOMES

1

INVERSION

What could cause this to fail?

Start by identifying the risks that could derail your plan.

2

STRUCTURE

Can I build around those risks?

Create a strong foundation designed to withstand uncertainty.

3

LEVERAGE

Can I accomplish more with the resources available?

Use leverage wisely to enhance efficiency and potential outcomes.

4

PATIENCE

Can I give the strategy enough time to work?

Time is a powerful ally when your plan is built to last.

= BETTER OUTCOMES™

Address risks, build a strong structure, use leverage wisely, and give it time.

WHY STRUCTURE MATTERS

IN EVERY AREA OF LIFE

1	2	3	4	5
BRIDGES	**AIRPLANES**	**TREES**	**THE HUMAN BODY**	**BUSINESSES**
need engineered supports.	need structural airframes and systems.	need roots, trunks, and branches.	needs a skeleton.	need systems, processes, and structure.

A financial plan is no different.

It needs structure - liquidity, protection, diversification, tax planning, and control over timing.

1. **CONTROL**
2. **LIQUIDITY**
3. **PROTECTION**
4. **DIVERSIFICATION**
5. **TAX EFFICIENCY**
6. **TIME**

WHAT SUCCEEDS WITHOUT STRUCTURE? ALMOST NOTHING.

STRUCTURE DETERMINES OUTCOMES™

WHERE DO YOU GO FROM HERE?

The framework is not a product. It is a way to think.

Want to explore the complete framework in more depth?

Watch The Inversion Wealth Framework™ webinar for a deeper walk-through of the four-part process and how it changes the questions you ask.

WATCH THE WEBINAR

www.oaktreeia.com

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Serving Clients Nationwide | Based in Northern Utah

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