LEGACY SOLUTIONS

SERVICE BROCHURE · NOVEMBER 2026

FINANCIAL COACHING

Build a clear plan for your money and your next property.

One-on-one coaching that turns your goals into a bank-ready plan, with someone in your corner every month.

Every legacy starts with a plan. Don't just make money, build wealth that outlives you.

Book your free 45-minute consultation or call 345-925-9810

WHERE YOU ARE TODAY

Doing well, but not sure you're on track?

→

WHERE WE TAKE YOU

Picture a year from now: a clear plan, your numbers in order and the confidence to take your next step.

US$157M+	**Since 2018**	**1, 3 and 5**	**Free**
financing secured for clients	helping Cayman families and businesses	year milestones in your plan	45-minute first consultation

YOUR CONSULTANT

Lori Moncrieffe

Founder & Consultant, Legacy Solutions
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THE CHALLENGE

Doing well, but not sure you're on track?

01 You are earning, but it is hard to see where the money goes or how to grow it.

02 You want to buy a home or an investment property, but don't know if a bank would say yes.

03 Debt, saving and investing decisions pile up with no clear order.

"Building wealth shouldn't depend on guesswork or going it alone."



YOUR GUIDE

Coaching from someone who knows how a bank reads your numbers

Lori Moncrieffe, MSc, CAMS · Founder & Consultant

Lori spent over 15 years in commercial banking, credit adjudication and corporate finance, reviewing personal and business finances the way a lender does. We use that experience to help you build a plan that holds up to a bank's review. Our coaching is issuer-neutral and educational: we earn no commission from any bank or product provider, so the plan is built around you.

US$450M+ structured across her career | Wharton Real Estate Investing & Analysis | John Maxwell Certified Coach and Speaker | DISC Behavior Consultant

WHY CLIENTS CHOOSE LEGACY SOLUTIONS

No products sold
Issuer-neutral. No commissions, ever.

Clear fees
Published in CI$ and agreed in writing.

Honest advice
We will tell you what you need, even if it is not us.

Confidential
Your information stays with your coach.

WHAT'S AT STAKE

Every year without a plan is a year of saving, credit building and property growth you don't get back.

WHAT SUCCESS LOOKS LIKE

Picture a year from now: a clear plan, your numbers in order and the confidence to take your next step.

THE PLAN

Your plan in three steps

01

Book a free consultation

A 45-minute call on your goals and where you are today.

02

Start at your tier

Foundation, Growth or Wealth, beginning with the Wealth Audit, the Financial Roadmap or 12-Month Coaching.

03

Grow with support

Monthly sessions, quarterly reviews and a clear next step every year, until you are ready to buy.

YOUR ROADMAP

Your first 12 months: the Foundation journey

01	**Wealth Audit** Health check, cash flow and net worth analysis, and a written action plan.	**Start** CI$675, credited within 60 days
02	**Get your snapshot** Your Personal Financial Statement: your whole picture on one page.	**Quarter 1** Coaching paid in advance
03	**Build your plan** A monthly budget that fits real life, and one clear 90-day goal.	**Quarter 1**
04	**Install the habit** Your first wealth-building habit running automatically.	**Quarter 1**
05	**Cash flow and debt** Savings and a reserve target automated, and a plan for paying down debt.	**Quarter 2**
06	**Financing readiness** A credit review, a bank-readiness assessment and a bank-ready file.	**Quarter 3**
07	**First property plan** A written plan tested against the numbers, with a clear path to buying.	**Quarter 4**
08	**Annual review** Net worth against your baseline, and your readiness for Legacy Growth.	**Finish line** Next tier: Legacy Growth

YOUR RHYTHM, ALL YEAR

MONTHLY	QUARTERLY	ANNUAL
One 60-minute or two 30-minute sessions, each with a written recap.	Statement refreshed, milestones scored and the next quarter planned.	Progress against your Wealth Audit baseline and your tier check.

YOUR INVESTMENT

Clear fees, agreed in writing

Published fees in Cayman Islands dollars, confirmed in writing before any work begins.

THREE TIERS. ONE JOURNEY.

TIER ONE

Legacy Foundation

Clarity first. Confidence follows.

START WITH

Wealth Audit, CI$675

TIER TWO

Legacy Growth

Systems that build wealth while you live your life.

START WITH

Financial Roadmap, CI$1,350

TIER THREE

Legacy Wealth

Protect what you have built. Pass it on with intention.

START WITH

12-Month Coaching, from CI$450 a month

Wealth Audit (credited if you join coaching within 60 days)	CI$675
Financial Roadmap	CI$1,350
12-Month Coaching, month to month	CI$675 / month
12-Month Coaching, paid quarterly (CI$600 a month)	CI$1,800 / quarter
12-Month Coaching, paid annually (CI$450 a month)	CI$5,400 / year
Legacy Wealth Retainer: Growth Monthly CI$675 (3-month minimum); Wealth Private CI$1,500 or Wealth Private Plus CI$2,500 (6-month minimum)	per month

Coaching is paid before each session. Legacy Wealth retainers are paid monthly in advance, with 30 days' notice after the minimum term. Coaching is educational and is not regulated financial, investment, tax or legal advice.

YOUR NEXT STEP

Book your free 45-minute consultation

We talk through where you are today and where you want to be, and recommend the right starting point for you.

Book a consultation

45 minutes · no cost · no obligation

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