
Blueprints For Tomorrow is Rebranding

January 2020 Newsletter | By: Ian Sachs, CFP®

At Risk Resource, we are passionate about helping business owners work on their business, not just in their business. As we settle into this new year, we are taking a page out of our own playbook.

We are excited to announce that we are merging Blueprints For Tomorrow - our exclusive program to help business owners prepare for the unexpected - under the Risk Resource umbrella. Risk Resource will continue to offer life insurance, disability insurance, long-term care, and annuities in addition to the Blueprints For Tomorrow program.

Our History

Risk Resource is a nationally recognized financial services company that was founded by Nate Sachs in 1983. Formerly known as The Sachs Group, the firm has insured the financial security of thousands of clients, both domestic and internationally, for almost 40 years.

In 2006, Nate and his wife, Dale, created Blueprints For Tomorrow, a customized program to help business owners be better prepared for the unexpected. This unique program helps owners recognize and address the three most unforeseen risks of owning and operating a business: death and/or serious illness, losing key employees (Keep for Lifers), and escaping the retirement tax trap. Since the program was established, Blueprints For Tomorrow has successfully implemented



BLUEPRINTS

FOR TOMORROW

contingency, succession, transition, and exit plans for over 3,000 business owners.

In 2015, Ian Sachs joined his father Nate as a Managing Partner of Risk Resource. With a background in Marketing and Communications, Ian brought critical experience in client communication, technology, and planning to the firm, while earning professional designations to provide best-in-class insurance and risk management planning advice. Ian is a Certified Financial Planner® and is completing his Chartered Life Underwriter and Chartered Financial Consultant designations.

In November 2019, Nate Sachs passed away after a courageous battle with cancer. Facing its own unexpected and devastating event, Risk Resource was able to continue operating due to the contingency/succession and key employee retention planning it had in place.

Looking Forward

The Risk Resource team is dedicated to carrying on the legacy of integrity and exceptional client service set by its founder, Nate Sachs. We look forward to both strengthening our existing relationships and developing relationships with new clients. Please reach out if you have any questions or would like to learn more about

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how we can be of value to you as we integrate Blueprints For Tomorrow with Risk Resource.

For more information about Nate's story, please click here:

[Phoenix Business Journal: Longtime Scottsdale businessman Nate Sachs loses battle with cancer](#)

About Risk Resource

Risk Resource is a nationally recognized financial services company that specializes in risk management and business contingency/succession planning. We are a single-source solution for a wide range of financial services that protect our clients, their families, and their businesses. With four decades of experience in insurance planning, we work with our clients to navigate the full spectrum of financial tools by exploring all options and customizing plans that meet their unique needs.

Risk Management: Our specializations include Life Insurance, Disability Insurance, Long-Term Care, Annuities, and Tax-Free Wealth Accumulation. We understand that every need is different which is why we represent over 100 insurance carriers. This gives us the flexibility and freedom to find the right solutions for each of our clients.

Contingency/Succession Planning: We work directly with closely held businesses to create customized strategies and solutions to prepare for the unexpected. To date, we have served over 3,000 business owners and their families across the country.