

**Background Briefing:** The US economy and financial markets have been performing well! Yet, with all the geopolitical and economic issues in the world, many nearing retirement are asking, “Am I prepared financially?” and “What will be my legacy?”

Despite the great financial performance and record employment numbers, progressive left ideologies are already starting to negatively impact some market sectors with headlines like this:

**Bloomberg News: Prognosis: A \$300 Billion Blowup Has Traders Bracing for War in Washington** By Vildana Hajric and Sarah Ponczek  
May 5, 2019

“All it took was a few mentions of Medicare for All this spring and suddenly health-care bulls were stuck with a \$300 billion loss. For investors just warming to a government that professed to put their interests first, the chill has been palpable.

“Everywhere you look, policy prescriptions from an avowedly more progressive wing of the Democratic Party are threatening to undo the loving embrace Wall Street has enjoyed under Donald Trump’s presidency.”

**Your Mission:** To understand some of the core principles between wealth and legacy. Second, to begin exploring new ways you can work with your financial advisor to weaponize your money/investments toward strengthening America.

**“The financial industry has been geared around the idea that you just invest. Invest in what you see as the best possible economic return, even if that meant you were investing in a Russian company or a Chinese company that was threatening America’s security. That’s not a good thing in the long run. You want to invest in those companies that believe in American values.” -Kevin Freeman, CFA**

## **(OSINT)- Open Sourced Intelligence Briefing**

*Kevin Freeman reviews legacy, wealth, and weaponizing our money to pro American values. Guest include, Guy Hatcher, CFP , "The Legacy Guy"-coach, author, entrepreneur / Jeff Rogers and Matt Hight with Stewardship Advisory.*

### **First: Understanding the difference between legacy and heritage – Guy Hatcher**

Heritage is your lineage right. Legacy is what you are going to leave.

"Everybody is going to leave a legacy. It is either going to be positive or negative."

—Guy Hatcher



## **What is happening to America now?**

America's Heritage- Unfortunately it is not taught much anymore, or revisionist history has taken over. Many Americans are concerned that the country they loved and grew up with is slipping away and may not be available for their children or their grandchildren.

Many see America as being assaulted everyday by foreign adversaries such as Russia, China, North Korea, and Iran.

Domestically: It is socialism and the New Green Deal. Is this just a Utopian ideal that does not really happen and turns into big brother?



The heritage that we inherited seems to be lost in translation with younger generations. American exceptionalism is viewed as almost non-existent.

I think the current generation does not see the America that we saw. If we don't start returning to our core values, not only as a nation, but also family by family, that America will disappear.

So I think one of the things I talk about in the book is how do you have family core values that you can not only work within your generation, but five generations from now, they can understand what that great, great, great, granddaddy guy believed in and stood for.

—Guy Hatcher

---

**A. It all Starts with your family!** America seems to be losing its values. Our culture and western civilization are under attack.

**Exercise I: Consider Your Family Legacy and Heritage:**

Start with the heritage you have. What is it? If it is good and moral, how do you build upon it? If your personal heritage is not as good, how you can be the hero and turn it around? A story of redemption and breakthrough can be potentially more impactful.

Secure family values first -  
Start with a shared vision that  
your family lives by.



PAGE 3



What are your shared values? Are they God, family, and country, or something else that you believe is critical to why you were put on earth? What is important to you, and what do you want your kids or the next generation to carry forward? What are the core values that will help your family and others succeed? We believe we are all here to make a difference. Work to help define what your family purpose is. Each member will carry it out in different ways, based on the gifts God has given them. But we should strive to have a shared vision.

Define what are your family values are:

- 1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

What is your family vision? Keep it simple and repeatable - Remember this is something you hope will be remembered for generations.

Our family will be: \_\_\_\_\_
\_\_\_\_\_
\_\_\_\_\_
\_\_\_\_\_
\_\_\_\_\_
\_\_\_\_\_

Have a plan for how you encourage and teach healthy relationships that are formed around you. What is important?



How do you hand off these relationships and values efficiently?

---

---

---

---

---

---

---

How can you reinforce these values within your family?

1. 

---
2. 

---
3. 

---

---

“Try not to become a man of success, rather become a man of value.” –Albert Einstein

---

**The Difference between Success and Values:**

Success is what we are all driving for,

**but**

Values are what actually sets the direction. They are the compass of where we're heading.

**“So I teach my children that we’re all going to make mistakes and have a few bad choices in life. But you’ve got to go back to your core values. Somewhere along the way, a bad choice means that you did not utilize that core value effectively. Core values should be the center of who we are, which ultimately becomes a result of what we choose.” –Guy Hatcher**

## **B. Relationships Matter**

God creates us for relationship. First, he created us to have a relationship with him. Second, He also puts people in our lives for us to have influence into and receive influence from.

**UNFORTUNATELY:** We’re not teaching the generations how to have healthy relationships.

**WARNING SOCIAL MEDIA AND SCREEN TIME DOES NOT BUILD HEALTHY RELATIONSHIPS.** Good healthy relationships for the next generation can be hard because the kids are looking at screen times of six to eight hours a day rather than interacting with people. Consider setting up boundaries on technology.

## **C. The Blessing and Relationships**

**1. Define the Vision** – Defining a vision for your family and children is important. Next, focus on it being a part of their future and included in their life.

**2. The Blessing to your Children.** In the Bible there are over 600 times in Scripture dealing with blessing. God blessed Abraham and Abraham blessed his children. So, it’s very biblical and it’s very foundational.

Every family issue seems to go back to the lack of the Blessing.



Consider letters of affirmation for your children. Take each of your children and share why you're proud of him. When he was six, when he was twelve, and when he is 18. If you don't want to give it to him when you are alive, attach it to the legal documents. The goal is to help families bridge that gap, so there is blessing and affirmation of generations going forward.

"I'm sitting down with sons and daughters and all of a sudden, we start talking about a bag of cash and an heirloom. They start fighting over everything. So, what I've finally figured out, it's really never about this stuff for most families. It's really about the lack of the Blessing or the lack of the affirmation coming from the previous generation." –Guy Hatcher

#### **D. The Financial Advisor** – Your Money and Helping Build Legacy:

Many advisors focus on the money part, but neglect the legacy part. Yet, research is showing legacy is even more important than wealth transfer to most clients.

Financial advisors and clients sometimes get caught up embracing the popular in order to get the money, rather than the important and the eternal.



"I think it's built within all of us that we want that make a difference for future generations. We just don't know how to do it." -Guy Hatcher



### **Lessons in History:**

The heirs of John D. Rockefeller, the guy that founded Standard Oil, and have a net worth more than the Exxon Mobil today. Rockefeller's heirs are taking the wealth they inherited, and they've partnered, maybe unwittingly, with Vladimir Putin and the anti-fracking movement. They're supporting the Green New Deal and all this anti-capitalist anti-energy movement in the United States.

Rockefeller built his company based upon the values that he chose. His heirs have chosen different values today. He would probably be in shock to learn to learn how the legacy he built has shifted another direction.

Other foundations, and even great universities like Harvard are often founded with core principles and values, but completely lose their direction over time. Passing that legacy to the next generation is critical.



President Reagan said, "freedom doesn't pass through the bloodstream. We're only one generation away from losing freedom, unless we pass that culture on."



**E. America's Wealth:** It's important then for the whole nation that we tie the wealth of this country, which is the greatest in the world, with the legacy and the heritage of the country.

Summary from Guy Hatcher:

1. We have to become the voice of reason when we disagree with things against our values; going on within our government, or within our economy. In a positive way, we have to stand up and say we disagree. And we've got to say these are the core values that we believe in not only as a family, but core values as a nation.

2. We've got to be willing to fight for our values. It's important and it starts one family at a time. The fight not only needs to be in words, but with our money.

**F. Weaponize your money** – consider that where you spend, where you invest, and where you give may determine the future of this nation.

Investing in index funds may mean you own shares in companies that stand against your values. You are funding your enemy in that sense.

---

## Legacy and Wealth

"There are many clients that really do want to leave a legacy more than wealth. But there are very few advisors willing to help clients leave a legacy. Most want to deal solely with the wealth because that's where they earn their money. This is why we created the Economic War Room and the NSIC. To help clients leave a positive legacy in their family and in the nation." –Kevin Freeman

**Introducing NSIC** (National Security Investment Consultant Institute) and Economic War Room Training.

In an economic war the financial advisor is on the front lines of geopolitical warfare. Jeff Rogers and Matt Hight were members of our NSIC Founders Class. They joined us in the Economic War Room to share their insights on the NSIC/EWR vision. Jeff and Matt are with Stewardship Advisory.



### **A. General Review:**

Cerulli Associates listed the Top 3 external Threats to Wealth:

1. Cyber Security
2. A potential market crisis
3. International relations crisis- North Korea or China

Each of these is addressed by the NSIC Institute and our training.

Client Profile Segmentation- What type of client are you? As clients read the news headlines, there are multiple client responses to potential economic threats:

1. **Overly fearful because you are listening to the wrong sources of information.**
2. **Not really aware, busy in life, and at time oblivious to what is going on.**
3. **Clients that are aware, they hear the news stories, and know they have a financial advisor that is taking the geopolitical threats into consideration and developing plans ahead of time for multiple scenarios.**

We hope as an EWR economic patriot you are moving to become client number 3. Encourage your financial advisor to be part of our battle plan updates and other solutions in development.



## B. NSIC Advisor Interview- (Jeff Rogers and Matt Hight)

The need for balance in your approach and investments:

There is a balance between not being fearful, but being aware and prepared. Also, as advisors we need credible information that we can use to help our clients be prepared. The Economic War Room provides credible news to the public, and the NSIC is helping financial advisors get a more in depth understanding around potential responses and solutions.

“The NISC helped bring new insights to our group as it relates to geopolitical threats and economic warfare. As advisors, there are limited resource to address this information. There is a need out there for new investment options for us to bring to our clients. Through the NSIC, I see those types of opportunities being developed. We look forward to bringing new solutions to our clients as options. When something is in the news, I like having the geopolitical background to help our clients make decisions” –Matt Hight



## C. Weaponizing Money Toward Pro American Values

There is a trend in values investing, but not really anything as it relates to pro-America investments. Biblical investing is a growing investment segment where people can invest in companies that represent their values. Likewise, we see SRI (socially responsible investing funds) focused on climate causes. SRI is seeing an uptick in millennial investors.

"There's not a lot out there on pro-America investments. In fact, I think the approach of the financial industry is overly simplistic in its response to this. But the approach of people out there, I'll call them the financial media in marketing:

- buy gold and avoid investing in anything else
- buy just the S&P 500 and don't worry about what's in it.

Neither of those are appropriate answers obviously." —Jeff Rogers

#### D. Where do you think your clients find value?

"Our clients love that we have the ability to help them align their investments with their values. Also, something that I've heard you talk about Kevin, that is going to be a theme going forward, is the weaponizing of their money. Once that opportunity is out there, many Americans will gravitate towards ways they can make a difference. Especially as it pertains to our national security, because that's something that both sides can come together on."

—Matt Hight

#### E. National Security Funds / A new form of investing to strengthen America

"The national security investment implications I think are new and really being brought to light through the Economic War Room. Thank you for your leadership in that area. As you mentioned Kevin, the socially responsible investing that's been around for a long time, over couple hundred years. If you go back





biblically responsible investing and actually aligning with biblical values that's relatively new over the past 20 or 25 years. We've been leaders in that. But one of the things that I've learned through the National Security Investment Consultant Institute is that there are literal national security implications to how we invest. In our perspective, as believers, is that it's not our money anyway it's God's. He's the owner and we're his stewards and so ultimately, we need to be asking the owner "how would you have me invest your money your resources?" I see the NSIC is bringing new information and new resources to help us to be able to do that." – Jeff Rogers

**F. Family Legacy:** We have a national heritage of freedom and liberty and so forth. We're seeing that kind of torn down right now and nobody's passing that on to future generations.

**G. Youth Movement where is it going? – Think Legacy Within Your Family** – Your son or daughter might be a leader that keep America on track. Politically it seems like everything is trending to the youth movement. And they're turning away from a lot of the American ideals that we grew up with. Schools are teaching them that socialism is cool. Do you see those distinctions in your clients from one generation to the next generation?

"We absolutely do, but also say there is a remnant and I think it's always been a remnant, even going back to the nation of Israel. There's a remnant of conservative young people as well who are taking a stand now. Granted, the pendulum has shifted to the left among the youth of America." –Jeff Rogers

**H. Creating a Thriving Family Legacy** – Jeff Rogers' *Sharing Wisdom and Wealth with our children and grandchildren*. Jeff shares from his book on Legacy:

The three marks of a good legacy: "Ray Lyne who is the founder of an organization called Lifestyle Giving taught me that there's three marks to a good legacy and by the way all three of these are types of hugs."

1. Will your children still be hugging each other six months after you die?
2. Will there be people in heaven giving you a hug because they're there partly because of your influence?
3. Will you get a hug from our heavenly father? Will you hear "Well done my good and faithful servant?"

If we have those three hugs those are the marks of a strong and lasting legacy.

For more information on how to transfer wealth to your family, Jeff's book is available here. <https://www.amazon.com/Create-Thriving-Family-Legacy-Grandchildren/dp/1946633046>

**Economic Patriots like  
You Can Make A Difference!**



## Why You Should Care:

1. It's your family and your legacy.
2. God wants you to be a good steward with the talents He has given you.
3. You want what is best for America.
4. You recognize we are in an economic war and want to protect America's national security and economic infrastructure
5. You believe in freedom and recognize we are one generation away from losing it.
6. You want all three hugs!
7. You are interested in your financial advisor to be on the front lines of the economic war America is facing.
8. In DC and Wall Street, Money makes a difference. You want to be part of a team of Economic Patriots that makes a difference.

In the Economic War Room, we encourage Americans to be the "small ships that make the difference." You cannot rely on the government or the president to solve your problems. You have to make a difference. It is up to you to help take our country back.

## Economic Patriot Action Plan

**Step 1:** Complete Exercise One in the battle plan for your family heritage and legacy. Check the links below for both, Guy Hatcher's and Jeff Rogers, books on legacy.

**Step 2:** Ask your financial advisor to consider being part of the economic war room and the National Security Investment Consultant Institute.

**Step 3:** Consider investments that support America. Look for more information coming soon on our financial advisor Economic War Room/NSIC training

**Step 4:** Love your family, bless them, give them affirmation!

**Step 5:** Focus on building wealth and legacy!

**Step 6:** Consider what can you do now to help strengthen America or even help someone in need. Keep in touch with your congressional representatives. Choose from the list or set your own goals:

→ Get others to sign up and review our weekly Economic War Room [Economic Battle Plans™](#). Each of these will address critical solutions to the threats highlighted on this briefing.

→ Subscribe to our weekly [Economic War Room show on TheBlaze](#). We need to break the digital ghetto that is limiting free speech regarding truth and liberty.



→ Follow, like, comment and share on [Facebook](#) and [Twitter](#). [We recognize these tools may be compromised at times, but when they are not filtered, they can be major platforms available to reach out to the public.]

→ Share this Economic Battle Plan™ and our short video segments on Facebook or YouTube with friends. We set up the Economic War Room to be your resource for information, preparation, and mobilization.

→ Think about ways you can mobilize or weaponize your money towards things that strengthen American. This can be through charitable giving, spending, or investments.

→ **Do this now!** Have a financial action plan based on multiple geopolitical scenarios developing now. Advanced preparation is key. Trying to figure what to do when an economic event happens is usually too late.

→ Talk with your financial advisor as it relates to your savings/ investments. Ensure your advisor understands the potential impact economic/geo-political scenarios could have on your portfolio. **LOOK FOR ECONOMIC WAR ROOM'S ADVISOR AND INVESTOR ONLINE TRAINING COURSE LAUNCHING THIS SUMMER.**

***Thank you for accepting this mission.  
Together, we will make a difference!***

**SHAREABLE QUOTES:**

(share this quote with your friends or at the office)

**“If you fear you will lose something today if you speak out, recognize you will lose everything someday if you do not.”**

–Romanian Communist Survivor

**“It is not our duty to leave wealth to our children: but it is our duty, to leave liberty to them.”**

– John Dickinson





## The EWR Collection Deck

From Kevin Freeman

### ABOUT GUY HATCHER

<http://www.guyhatcher.com>

Your Future Reflection (book)

<http://www.guyhatcher.com/book/>

Driven to Lead: Awaken the Leader Within You

<https://driventolead.org>

Are You Looking for Your Identity in Your Wallet?

<http://1080theword.com/articles/family/finances/are-you-looking-for-your-identity-in-your-wallet>

4 Leadership Milestones to Become a Great Leader

<https://www.crosswalk.com/family/career/4-leadership-milestones-to-become-a-great-leader.html>

### ABOUT JEFF ROGERS, MATT HIGHT, AND STEWARDSHIP PARTNERS

Stewardship Advisory Group

<https://www.stewardshipadvisory.com>

<https://www.stewardshipadvisory.com/team/jeff-rogers>

<https://www.stewardshipadvisory.com/team/matt-hight>

Create A Thriving Family Legacy: How To Share Your Wisdom And Wealth With Your Children And Grandchildren by Jeff Rogers

<https://www.amazon.com/Create-Thriving-Family-Legacy-Grandchildren/dp/1946633046>

<https://thrivingfamilylegacy.com>

### **LEAVING A LEGACY**

What Does Passing on Values to the Next Generation Really Look Like?

<https://www.advisorperspectives.com/articles/2019/03/12/what-does-passing-on-values-to-the-next-generation-really-look-like>

Clients Value Passing on Stories More Than Wealth

<https://www.wealthmanagement.com/high-net-worth/clients-value-passing-stories-more-wealth>

Your Legacy: Leaving Behind More Than Money

<https://www.forbes.com/sites/ericbrotman/2019/03/15/your-legacy-leaving-behind-more-than-money/#2516a4b81e66>

What Does it Mean to Leave a Legacy?

<https://moneywithapurpose.com/what-does-it-mean-to-leave-a-legacy/>

### **MARKET VOLATILITY AND HOW YOU CAN PREPARE**

<https://www.thestreet.com/investing/market-volatility-sparks-anxiety-in-many-investors-study-14948335>

<https://www.bloomberg.com/news/articles/2019-05-05/a-300-billion-blowup-has-traders-bracing-for-war-in-washington>

Note: The Economic Battle Plan™ contains hyperlinks to other Internet sites not under the editorial control of EWR-Media Holdings, LLC. These hyperlinks are not express or implied endorsements or approvals by EWR-Media Holdings, LLC, of any products, services or information available from these 3rd party sites. Links to these 3rd party sites are open source links that may require subscription or registration.