

The Inspirational One Page Business Plan



Decision Fatigue



How many have a smart phone?



What is the operating system?



What happens when you don't upgrade?



When is the last time you upgraded?

Information Overload



5 Quintillion bytes



90% Information last 2 years



Average high school student stress



Financial advisor stress



How does a financial advisor relieve stress?

Information Overload

What has changed in your mind since COVID-19?



Purpose

📈 meet & exceed your goals

👑 identify strengths & roadblocks

🕒 10% = HOW & WHAT

🕒 90% = WHY



FPA Survey



 Why do YOU do what you do?



Help Clients



Make A Difference



Stewardship



Vocation



Worship

FPA Survey



What do YOU like about it?



Creativity



Learning



Opportunity



People



ROI



Satisfaction



Teaching



FPA Survey

 What is not so great about it?



Change



Clients Not Implementing Advice



Pace



Paperwork



Regulation/Compliance



Stress



Time Constraints/Consuming

FPA Survey

 What are the 3 biggest improvements?



Accountability



Client Communication



Focus



Grow AUM/Practice



Listening/Presenting



Procedures/Process



Prospect Qualification

FPA Survey

 What are the 3 biggest improvements?

 Referrals

 Staff

 Succession Plan

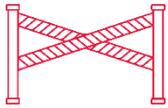
 Technology

 Team Building/Hiring

 Well Being

 Work Less Hours

FPA Survey



What are the 3 biggest roadblocks?



Delegation



Distractions



Finding/Keeping Clients



Low Energy / Mindset / Old Habits



Overwhelm



Regulation/Compliance



Time

Outcomes



Change



Succession Plan



Team Building/Hiring



Delegation



Client Communication



Clients Not Implementing Advice



Finding/Keeping Clients



Grow AUM/Practice



Prospect Qualification



10% Success

= HOW & WHAT



Accountability



Distractions



Focus



Low Energy / Mindset /



Old Habits Overwhelm



Stress



Time



Well Being



Work Less Hours



90% Success

= WHY



🕒 10%. Success
= HOW & WHAT

vision
business plan
accountability
time management
focus
team building
delegation
marketing & sales
customer service
planning & products

🕒 90%. Success
= WHY



What is Your Score?

Financial Survivor

I lack focus.

1...10

Financial Advisor

I follow a written 5-year vision and business plan.

WHY?

One Page Business Planning Terms



1. Vision:

What are you building?



2. Mission:

Why does this business exist?



3. Objectives:

What results will you measure?



4. Strategies:

How will you build this company?



5. Action Plans:

What is the work to be done?



6. Purpose:

Why are you in business?

Vision Statements: What are we building?

- What will this business look like in 1, 3, 5 yrs?
- What type of company is this?
- What markets does it serve?
- What is the geographic scope?
- Who are target customers?
- What are the key products and services?
- What sales goal are we striving for?



Vision Statements: Example

Within the next 3 years grow Jane Doe's Financial Advisor Business into a Ontario advisor practice managing \$40 million yielding at least \$350,000 in gross revenues specializing in plan development, asset management and asset protection for professional working women age 30 to 60 who want to be financially prepared for retirement.



Vision Statements: Why Does Business Exist?

- Who are our customers?
- What key customer needs do we serve?
- What wants, needs, desires, pain, or problems do our product services solve?
- What is our unique selling proposition? What is the key competitive edge or unique quality that we have in serving that need?
- What promise do we make to our customer?

Consolidated Plan	
One Page Plans	Scorecards
Jerome Johnson, President/CEO Date: 10-28-01	
vision	Within the next three years grow ZTC into a \$2 billion global provider of integrated work-flow solutions for Fortune 1000 companies, major municipalities, and governmental agencies. ZTC, Inc. will be headquartered in San Francisco with offices in New York, Dallas & London.
mission	Build productivity solutions that reduce the cost of labor, materials, and maintenance.
objectives	<ul style="list-style-type: none">• Over consolidated revenue by 20% to \$90 million in FY 2002• Achieve gross profit before interest and taxes of 25%• Increase gross profit from 40.2% to 25%• Complete at least 600 new system installations by 12/31/02• Migrate at least 400 existing clients to ZTC's internet product by 2nd quarter 2002• Introduce new internet product by Mar '02; release Q2 sales of \$2M, Q3 \$3M, Q4 \$4M• Increase sales per employee from \$250,000 to \$300,000• Reduce accounts receivable from 60 days to 45 days by 6/30/02• Achieve EBITDA breakeven of \$1,000 by 12/31/02.
strategies	<ul style="list-style-type: none">• Future: Align with industry leaders, partner for marketing & solution development.• Product Approach: Customize rather than customize, business rules re custom programs• Competitive Positioning: Custom core based pricing, modular systems for flexibility• R&D: Workflow solutions, open systems, multi-platform, open standard, flexible• Resources: People and systems resources in place before they are needed.• Develop aligned teams with sense of urgency, responsibility and accountability.• Develop Employee Incentive Programs to allow the team to share in the rewards.
plans	<ul style="list-style-type: none">• Develop comprehensive Employee Recruitment and Retention Program by 1/15• Implement Future Performance Incentive Plan by 2/28, and RBA by 2/28• Complete beta test of Process Flow Performance module by 5/31• Develop Sales Force Automation Plan by 6/30, implement by 4th quarter 2002• Launch Global Customer Forum for sharing implementation & lessons by 6/30• Complete business registration in Dallas by 6/30, London by 10/31• Implement financial reporting system at group/level level by 10/31• Implement professional skills development program by 11/30

Our Vision Statement

To be the premier community of financial planners in Northeastern New York and to serve as the leading financial planning resource for the public and media.



The Heart of Financial Planning™

Our Mission and Purpose

FPA-NENY champions the financial planning process by fostering public awareness on the value of financial planning. And by offering our members mentoring and networking opportunities, and the highest quality education.



The Heart of Financial Planning™

Objectives - 1 Year

- Increase assets under management from \$20 million in 2019 to \$25 million by end of 2020
- Increase COI calling Time from 1 hr per week in 2019 to 4 hr per week in 2020
- Increase Team Meetings / Reviews from 2 X per year in 2019 to 4 X per year in 2020
- Increase Asset Discovery Process/Needs Analysis from 1 per wk in 2019 to 3 per wk in 2020

Increase Client Commitment from 60% in 2019 to 80% in 2020

Receive 1 ideal Referral from all clients at Needs Analysis presentation meetings.

Increase Clients Paying Fee For Service from 5% in 2019 to 30% in 2020.

Consolidated Plan				
One Page Plans	Scorecards	Program Reports	Plan Status	Help
Jerome Johnson, President/CEO Draft: 10-25-01				
vision	Within the next three years grow ZTC into a \$2 billion global provider of targeted wealth flow solutions for Fortune 500 companies, major municipalities, and government agencies.			
mission	Build proprietary solutions that reduce the cost of labor, materials, and maintenance.			
objectives	<ul style="list-style-type: none">• Over consolidated revenue by 30% to \$90 million in FY 2022• Achieve profit before interest and taxes of \$50 million.• Increase gross profit from 46.7% to 52%.• Complete at least 400 new system installations by 12/31/02.• Manage at least 400 existing clients to 27000 system products by 2nd quarter 2002.• Introduce new internet products by Mar '01, achieve Q3 sales of \$25m, Q4 \$30m.• Reduce labor per employee from \$25,000 to \$30,000.• Reduce Accounts Receivable from 60 days to 45 days by 6/30/02.• Achieve FTE headcount of 1,600 by 12/31/2002.			
strategies	<ul style="list-style-type: none">• Partners: Align with industry leaders, partner for marketing & solution development.• Product Approach: Challenge value chain customers, business value via custom programs.• Competitive Positioning: Optimize core based pricing, modular systems for flexibility.• R&D: Workflow solutions, open systems, multi-platform, object-oriented, flexible.• Resources: People and systems resources in place before they are needed.• Develop digital team with focus of agility, responsibility and accountability.• Develop Employee Incentive Programs to allow the team to share in the rewards.			
plans	<ul style="list-style-type: none">• Develop comprehensive Employee Recruitment and Retention Program by 1/15.• Implement Partner Partner Initiative w/Oracle, Sun and IBM by 2/28.• Complete Sales Lead Off-Process Plan Performance module by 6/15.• Develop Sales Force Automation Plan by 9/30, implement by 4th quarter 2002.• Launch Global Customer Forum for sharing implementation of services by 9/31.• Complete facilities upgrade in Dubai by 9/31, London by 10/31.• Implement financial reporting system at regional level by 10/31.• Implement professional skills development program by 11/01.			

Strategies - 1-5 Years

- Reduce amount of time spent on administration by prioritizing A tasks and delegating B tasks.
- Increase revenue per client by increasing number of A&B clients; no new C&D clients.
- Create a Fee For Service Script and implement in new client and review meetings.
- Create Succession Plan
- Create Marketing Plan to Increase Communication With Clients Adult Children
- Become recognized for Lifestyle Protection & Wealth Management planning and solutions through Posts - Blogs/LinkedIn/Speaking Presentations

Consolidated Plan

One Page Plans Scorecards Program Features Plan Status Help

Jerome Johnson, President/CEO **Default** (0, 28, 0)

vision

Within the next three years grow ZTRC into a \$2 billion global provider of integrated wealth flow solutions for Fortune 1000 companies, major municipalities, and governmental agencies.

ZTRC, Inc. will be headquartered in San Francisco with offices in New York, Dallas & London.

mission

Build productivity solutions that reduce the cost of labor, materials, and maintenance.

objectives

- Over consolidated revenue by 20% to \$90 million in FY 2012
- Achieve profit before interest and taxes of \$10 million.
- Increase gross profit from 40.2% to 55%
- Complete at least 60 new system installations by 12/31/12
- Migrate at least 400 existing clients to ZTRC internet product by 2nd quarter 2012
- Introduce new internet product by Mar '11, volume Q1 sales of \$2M, Q2 \$3M, Q4 \$5M
- Increase sales per employee from \$250,000 to \$300,000
- Reduce Accounts Receivable from 60 days to 45 days by 03/09/12
- Achieve ETE benchmark of 1,000 by 12/31/2012.

strategies

- Future: Align with industry leader, partner for marketing & solution development.
- Product Approach: Continue reduce time, customer, business value re custom programs
- Competitive Positioning: Continue core based pricing, mobile systems for flexibility
- R&D: Workflow solutions, open systems, multi-platform, open standard, flexible
- Resources: People and systems resources in place before they are needed.
- Develop aligned team with sense of agency, responsibility and accountability.
- Develop Employee Incentive Programs to allow the team to share in the rewards.

plans

- Develop comprehensive Employee Recruitment and Retention Program by 1/15
- Implement Future Partner Initiative w/Oracle, Sun and IBM by 2/15
- Complete beta test of Three Five Performance module by 04/15
- Develop Client Entry Automation Plan by 06/01, implement by 4th quarter 2012
- Launch Global Customer Forum for sharing implementation & lessons by 07/01
- Complete business registration in Dallas by 05/01, London by 10/01
- Implement financial reporting system at group/agent level by 10/01
- Implement professional skills development program by 11/01

Action Plan Statements

- Give Thanks, Empty Mind, ID Like Best / Delegations, Write Job Descriptions by 1-Jan-2020
- Complete 2020 Vision, Business Plan & Goals c/w BCF by 1-Jan-2020
- Debrief Week – Worked, Didn't Work, Help Required, Next Week Actions by 1-Jan-2020
- Increase Team Meetings / Reviews from 2 - 4 X per year by 31-Mar-2020
- Complete Quarterly / Semi-Annual Review by 30-Mar-2020
- Increase Client Commitment by 30-Mar-2020
- Hire New Assistant or Advisor by 1-Sep-2020
- Implement Fee For Service Script by 31-December-2020



6 Essential Tips / Overwhelmed / Empty Your Brain

PROJECT/TASK/TO DO	CATEGORY	PRIORITIES	DATE	DELEGATE
				
				
				
				
				

8 Time Management Basics



1. What are your beliefs about time?



2. Plan Your Day



3. Do Your ABC's



4. Check in every 15 minutes



5. Form The Habit Of Allowing 5 to 15 Minutes To Review Your To-Do List



6. Use A Week At A Glance 24/7 Diary



7. Start Time Blocking



8. Time Block Free, Buffer & Focus Days

sreilly@leadingadvisor.com



Timeblocking

Sep 16	Sep 17	Sep 18	Sep 19	Sep 20	Sep 21	Sep 22
Sep 23	Sep 24	Sep 25	Sep 26	Sep 27	Sep 28	Sep 29
Sep 30	Oct 1	Oct 2	Oct 3	Oct 4	Oct 5	Oct 6
Oct 7	Oct 8	Oct 9	Oct 10	Oct 11	Oct 12	Oct 13

Green-free, holiday, time off

Blue-buffer-work on business

Red-clients and prospects

Orange-travel and writing

Purple-exhibiting and speaking

Yellow-filming and writing

	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
5:00		MEDITATION	MEDITATION	MEDITATION	MEDITATION	MEDITATION	
5:30		READ	READ	READ	READ	READ	
6:00		BREAKFAST	BREAKFAST	BREAKFAST	BREAKFAST	BREAKFAST	
6:30		SHOWER	SHOWER	SHOWER	SHOWER	SHOWER	
7:00		BUFFER DAY	CLIENT	CLIENT	CLIENT	CLIENT	
8:00							
8:15			CLIENT	CLIENT	CLIENT	CLIENT	
9:30			CLIENT	CLIENT	CLIENT	CLIENT	
10:45			CLIENT	CLIENT	CLIENT	CLIENT	
12:00							
1:15			CLIENT	CLIENT	CLIENT	BUFFER DAY	
2:30			CLIENT	CLIENT	CLIENT		
3:45			CLIENT	CLIENT	CLIENT		
5:00	YOGA	YOGA	YOGA	YOGA	YOGA	YOGA	YOGA
6:00							
7:00	DINNER	DINNER	DINNER	DINNER	DINNER	DINNER	DINNER
8:00							
9:00	SLEEP	SLEEP	SLEEP	SLEEP	SLEEP	SLEEP	SLEEP

Virtual Advisor Tips



1. Clients Already Have Virtual Meetings With Family And Friends
2. Get Out Of Overwhelm & Manage Your Time
3. Set Up Workspace & Equipment
4. Learn A Video Conferencing Platform
5. Practice Five Virtual Meetings
6. Create Video Conferencing Instructions For Clients
7. Practice Meeting Script & Presentation Material
8. Invite Clients To Your Virtual Meeting
9. Ask Your Clients To Prepare For Your Meeting In Advance
By Answering Questions

Virtual Advisor Tips



10. Record Your Meetings
11. Send Your Client Follow-up
12. Notes Can Be Re-Purposed For Social Media
13. Notes Streamline Getting Organized For The Next Client Meeting
14. Create A Communication Plan
15. Use Online Scheduling

7 Time Bandits



1. Eliminate Busy Work



2. Schedule Time In Advance and Ask What Is Going To Distract Me?



3. Form Time Boundaries



4. Block Time For High Net Worth Clients



5. Blocking Out Disruption Don & Donna



6. Blocking Out Calamity Client That Never Has An Appointment
When You Forgot To Lock Your Door During Block Time



7. Aggressive High New Worth Andy

Team Delegation



Time Block



Empty Your Mind



Delegate In Writing

6 Essential Tips / Overwhelmed / Empty Your Brain

PROJECT/TASK/TO DO	CATEGORY	PRIORITIES	DATE	DELEGATE
				
				
				
				
				

Team Meetings – Team Advance Preparation



What have you accomplished since our last meeting?



What didn't you get done since our last meeting?



What help do you need?



What actions are you committed to taking this week?



Login  

Company Name: User Name: Password:

[Need Help Logging In?](#)

The One Page Planning and Performance System

Enterprise Planning at the Speed of the Web

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My Plan	All Plans	Scorecards	Progress Reports	Status	Help
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Point, Click, Plan!

FINANCIAL SERVICES ONLINE EDITION

*The Fastest, Easiest Way
to Write a Business Plan*

[Get Started](#)

ONE PAGE PLAN For Technical Support call your One Page Planning Consultant
If unable to reach them call 510-705-8400 M-F 9-5 Pacific Time

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Point, Click, Plan! Online: Simon Reilly, Advisor



- My Plan
- All Plans
- Scorecards
- Progress Reports
- Status
- Point, Click, Plan!**
- Help
- Log Out

Getting Started

- Introduction
- User Tips
- Overview

Lessons

- **Vision**
- Mission
- Objectives
- Strategies
- Action Plans

Wrap Up

- Polish & Edit
- Sample Plans
- Resources
- Implementation

Page: 18

A Simple Formula for Writing Your Vision

< back next >

**Business Type + Geographic Scope + Estimated Sales
+ Client Profile + Core Products/Services**

Questions are powerful to help draw out your Vision. "Fill-in-the-blank statements" are highly effective in accomplishing the same goal. Below is the fill-in-the-blank format we have used with thousands of businesses. Each of the blanks in essence is a question; complete all the blanks, and you have created a quick first draft.

"Within the next __ years grow _____
(company name)

into a \$ _____ company
(est. annual sales) (geographic scope) (type of business)

providing _____
(list 2-3 of your key products/services)

for/to _____"
(list 2-3 key clients/customers)

The following Vision Statement was created using the fill-in-the-blanks template and then edited. It is brief, but very clear.

"Within the next 3 years grow Roberta Jones' practice at Boston Financial Advisory Services into a regional financial advisory practice managing \$40 million in assets yielding at least \$350,000 in gross revenue specializing in plan development and asset management for professional working women age 30 to 60 who want to be financially prepared for retirement."

Point, Click, Plan! Online: Simon Reilly, Advisor



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Page: 19

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Advisor/Agent Vision Statements that Work...

Each of the sample Vision Statements below paints a concise, graphical picture of how these individual financial services professionals view their practice over the next few years.

Foster Investment Services	Within the next 3 years, build my practice, Beth Foster Investment Services to a level that produces \$150,000 in annual compensation by providing investment services to affluent career women in San Joaquin county.
Family Wealth Counselors	Within the next three years grow Allen Johnson, Financial Advisor at Family Wealth Counselors into a successful practice with \$75 million in assets under management, producing annual revenues of at least \$700,000 by providing consultative financial services in the greater San Diego area to busy professionals, active retirees and non-profit organizations.
Memphis Long Term Care Insurance	In the next four years grow my Memphis territory at Genworth Financial into a successful long term care insurance practice generating at least \$200,000 in annual revenue by focusing on individuals typically 50+ years old who want to protect their wealth and income while maintaining their dignity and independence.
Farmers Insurance Agent	In the next three years grow my Farmers Insurance office in Topeka Kansas to a successful community based insurance practice generating a minimum of \$400,000 in gross revenues by providing auto, home, life and business insurance to individuals, families and small business owners within a 20 mile radius.

Planning Unit: Leading Advisors Inc.



- My Plan**
- All Plans
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- Point, Click, Plan!
- Help
- Log Out

Simon Reilly, Advisor

Draft: 08-Sep-2013

- Export to Word
- Spell Check
- Unpost Plan



vision

Within the next 3 years grow Jane Doe's Financial Advisor Business into a Southern Ontario advisor practice managing \$40 million yielding at least \$350,000 in gross revenues specializing in plan development, asset management and assessment protection for professional working women age 30 to 60 who want to be financially prepared for retirement.



mission

We Help _____



objectives



strategies

https://onepageplans.com/financedemo/plan.php

One Page Plans

Planning Unit: Leading Advisors Inc.

My Plan All Plans Scorecards Progress Reports Status Point, Click, Plan! Help Log Out

Simon Reilly, Adv

Objectives

Financial Customer Process Improvement Learning/Growth Preview Objectives

Revenue/Income Increase 2012 revenue/income from \$ _____ to \$ _____.

Business Profit / Personal Income Earn pre-tax business profit (or personal income) in 2011 of \$ _____.

Commissions Earned Increase commissions earned from \$ _____ to \$ _____.

Fees Earned Write what I want

Premiums Written Increase premiums written from \$ _____ to \$ _____.

Assets under Mgt Increase assets under management from \$ _____ to \$ _____.

Return on Assets Increase return on assets from __ % to __ %.

Production/Month Increase revenue/production per month from \$ _____ to \$ _____ by _____.

Case Size Increase income/production/case size per client from \$ _____ to \$ _____ by _____.

vision
mission
objectives
strategies

8:51 PM
08/09/2013

Planning Unit: Leading Advisors Inc.



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Simon Reilly, Advisor

Draft: 08-Sep-2013

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vision

Within the next 3 years grow Jane Doe's Financial Advisor Business into a Southern Ontario advisor practice managing \$40 million yielding at least \$350,000 in gross revenues specializing in plan development, asset management and assessment protection for professional working women age 30 to 60 who want to be financially prepared for retirement.



mission

We Help _____



objectives

- Increase 2012 revenue/income from \$ _____ to \$ _____.
- Increase commissions earned from \$ _____ to \$ _____.
- Increase assets under management from \$ _____ to \$ _____.
- Increase revenue/production per month from \$ _____ to \$ _____ by _____.
- Increase # of contacts per day from _____ to _____ by _____.
- Increase # of appointments per week from _____ to _____ by _____.
- Increase # of presentations per week from _____ to _____ by _____.
- Increase # of ideal referrals received per month from _____ to _____ by _____.
- Increase # of COI/Network referrals received per month from _____ to _____ by _____.





We Help _____

mission



objectives

- Increase 2012 revenue/income from \$ _____ to \$ _____.
- Increase commissions earned from \$ _____ to \$ _____.
- Increase assets under management from \$ _____ to \$ _____.
- Increase revenue/production per month from \$ _____ to \$ _____ by _____.
- Increase # of contacts per day from _____ to _____ by _____.
- Increase # of appointments per week from _____ to _____ by _____.
- Increase # of presentations per week from _____ to _____ by _____.
- Increase # of ideal referrals received per month from _____ to _____ by _____.
- Increase # of COI/Network referrals received per month from _____ to _____ by _____.



strategies



action plans

- Empty Mind, ID Like Best / Delegations, Re-Write Job Descriptions by 15-Sep-2013
- Complete Vision, Business Plan & Goals by 1-OCT-2013
- Complete 2013/14 Time Management Plan c/w Free, Buffer & Focus Days by 1-Oct-2013
- Increase Team Meetings / Reviews from 2 - 4 X per year by 1-Nov-2013.
- Hire New Assistant or Advisor by 1-Nov-2013.
- Segment Clients & ID 3 Niches (Like/Community/Money) by 15-Nov-2013.
- Conduct Best / Expect Interview by 1-Dec-2013.
- Implement New Client Review Process by 15-Jan-2014.

“Complimentary VIP Offer”

Values Based Business Operating System

Step 1

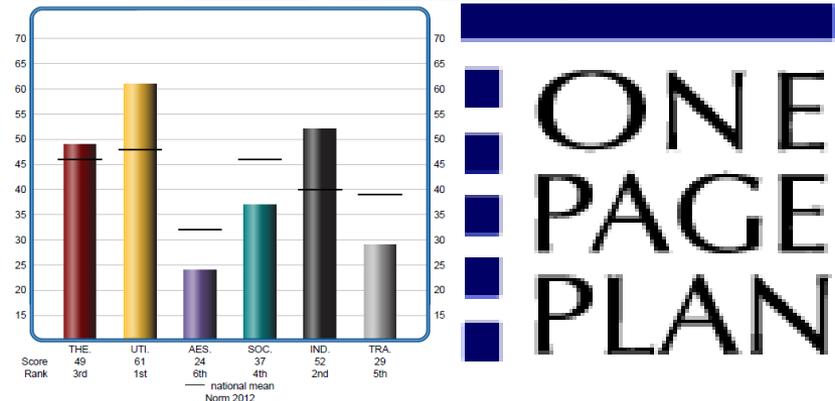
Complete 30-minute Interview
Call with Laura Reilly

Step 2

Complete online Values Based
Business Operating System Assessment

Step 3

Complete 60-minute Assessment
Debriefing with Simon Reilly



sreilly@leadingadvisor.com

Purpose

📈 meet & exceed your goals

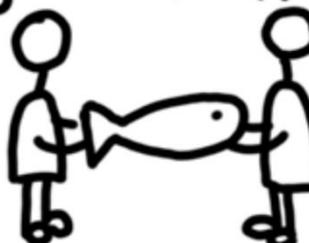
👑 identify strengths & roadblocks

🕒 10% = HOW & WHAT

🕒 90% = WHY

~~Wrong~~
absence of understanding

give a fish
feed for a day



teach to fish
feed for a lifetime



Why Are You In Business?

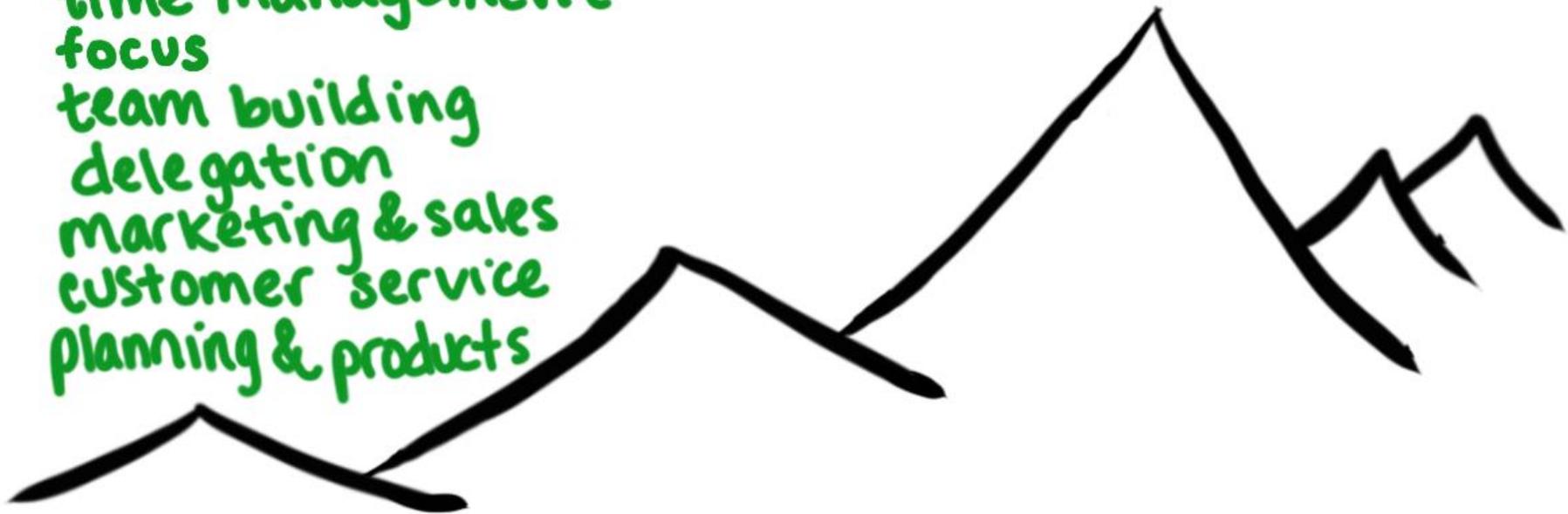
- Purpose sustains and fuses the Vision, Mission, Objectives, Strategies and Action Plans together
- Understand Success Is 90% WHY and 10% HOW And WHAT by 1-Jan-2020
 - Behaviors – how and what you do
 - Values – why you do what you do



🕒 10%. Success
= HOW & WHAT

vision
business plan
accountability
time management
focus
team building
delegation
marketing & sales
customer service
planning & products

🕒 90%. Success
= WHY



First Understand

- ... When there is **judgement** there can be no understanding
- ... When there is **deference** there can be no understanding
- ... When there is **doubt** there can be no understanding
- ... When there is **fear** there can be no understanding

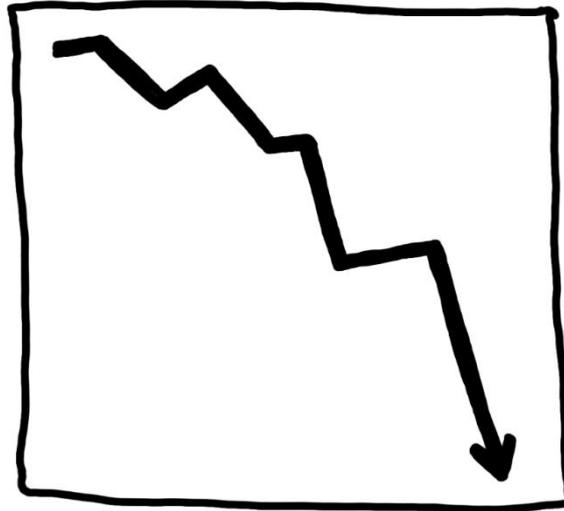


Understanding can overcome any situation,
however mysterious or insurmountable it may
appear to be. - Norman Vincent Peale

The Washington Post

THURSDAY, OCTOBER 24, 1929

Stock Market Suffers Largest Loss in History





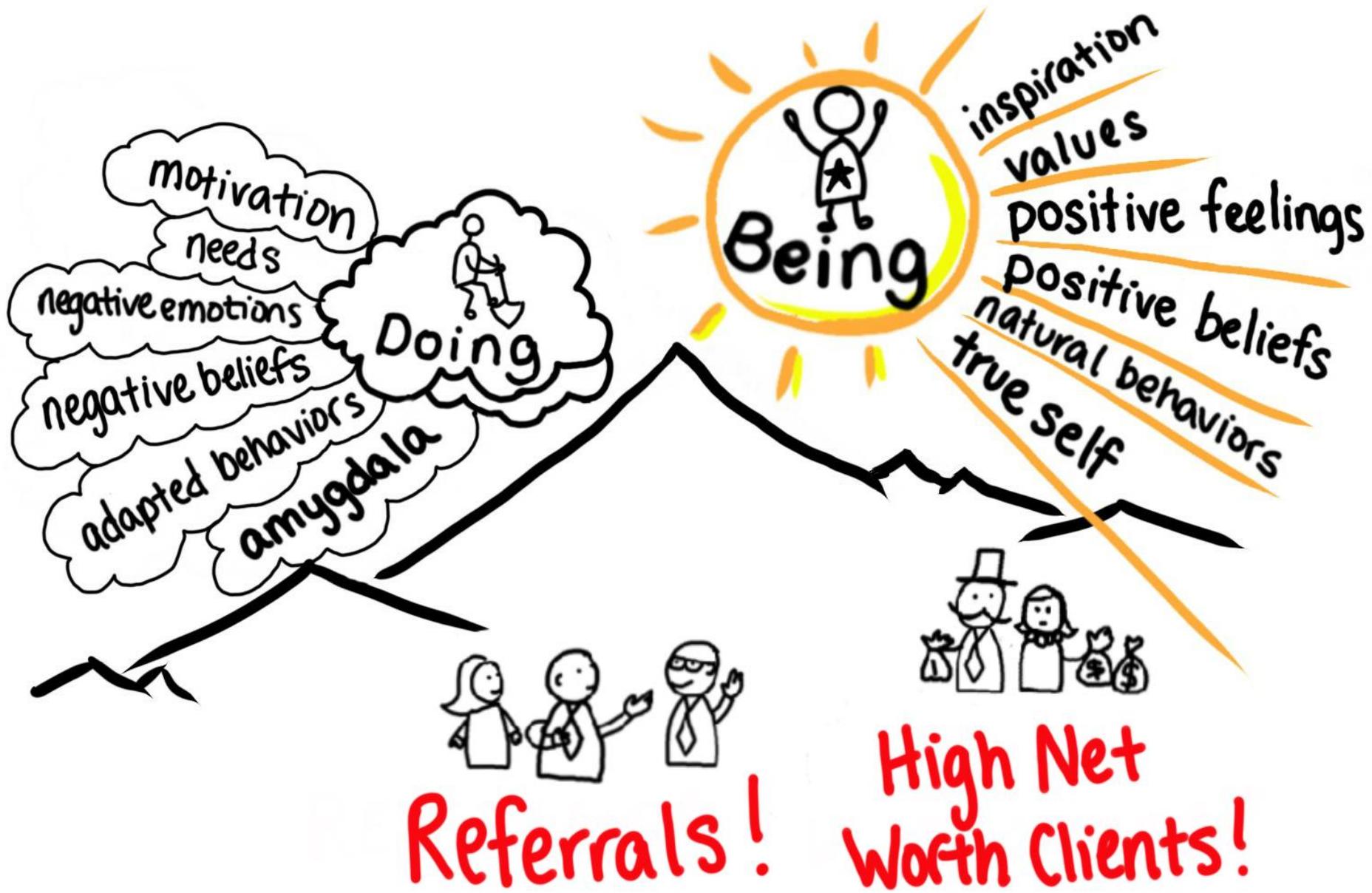
Real Forces!







Delegation! Hiring!



Attraction Affirmation

 I am Attracting my goal of increasing AUM from \$50 million in 2019 to \$75 million in 2020 as

 I value consulting, discovery and listening and

 I feel certain, confident and inspired and

 I believe I have the experience & service and my company has the best products to help my clients to create a plan, to grow assets, protect assets, save tax and leave a legacy

Distraction Affirmation



I am Attracting my goal of increasing AUM from \$50 million in 2019 to \$75 million in 2020 as



and even though I value consulting, discovery and listening I need approval, control, perfection, safety and worthiness and



and even though I feel certain, confident and inspired and I feel anxious, overwhelmed and uncertain and



even though I am trying to believe I have the experience & service and my company has the best products to help my clients to create a plan, to grow assets, protect assets, save tax and leave a legacy I am insecure, powerless and unworthy

“Complimentary VIP Offer”

Values Based Business Operating System

Step 1

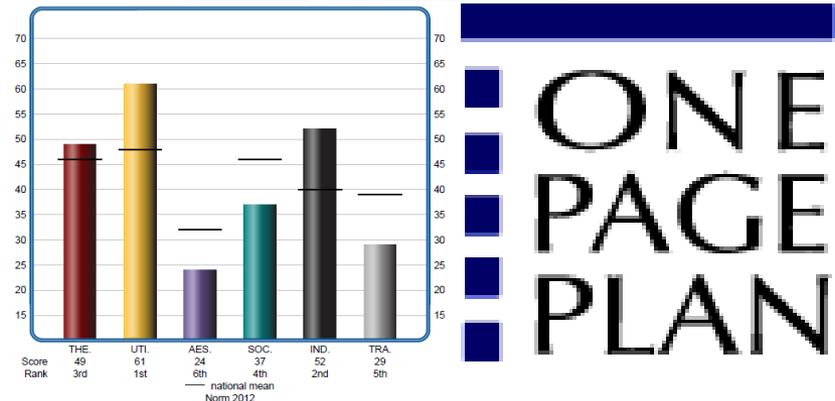
Complete 30-minute Interview
Call with Laura Reilly

Step 2

Complete online Values Based
Business Operating System Assessment

Step 3

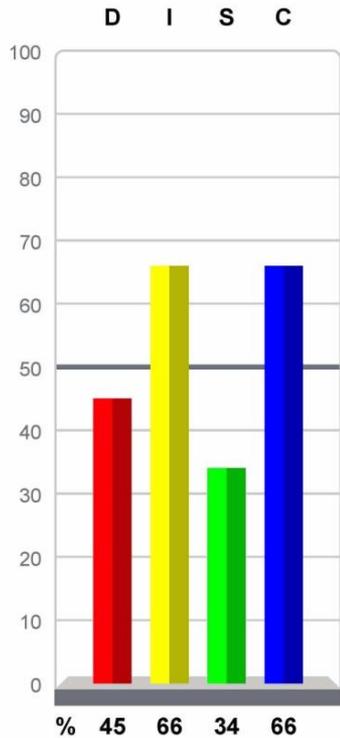
Complete 60-minute Assessment
Debriefing with Simon Reilly



sreilly@leadingadvisor.com

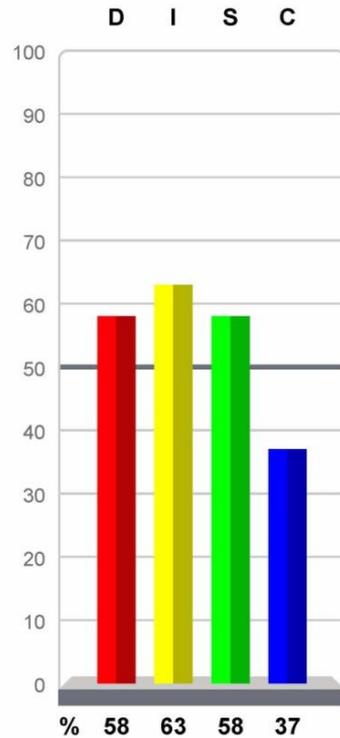
Adapted Style

Graph I

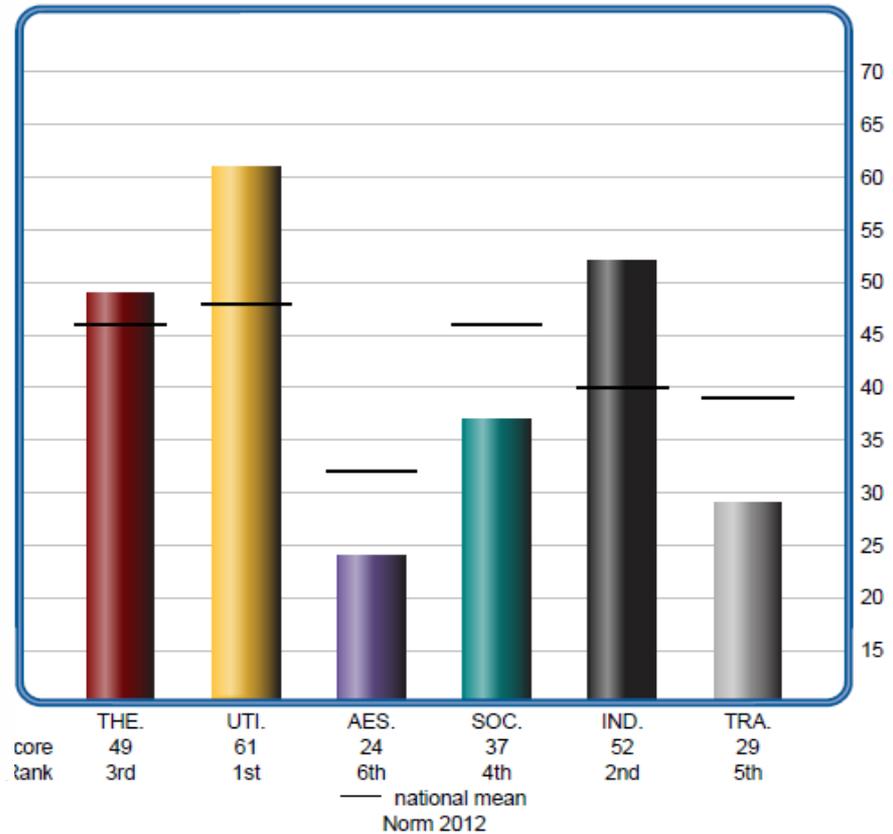


Natural Style

Graph II



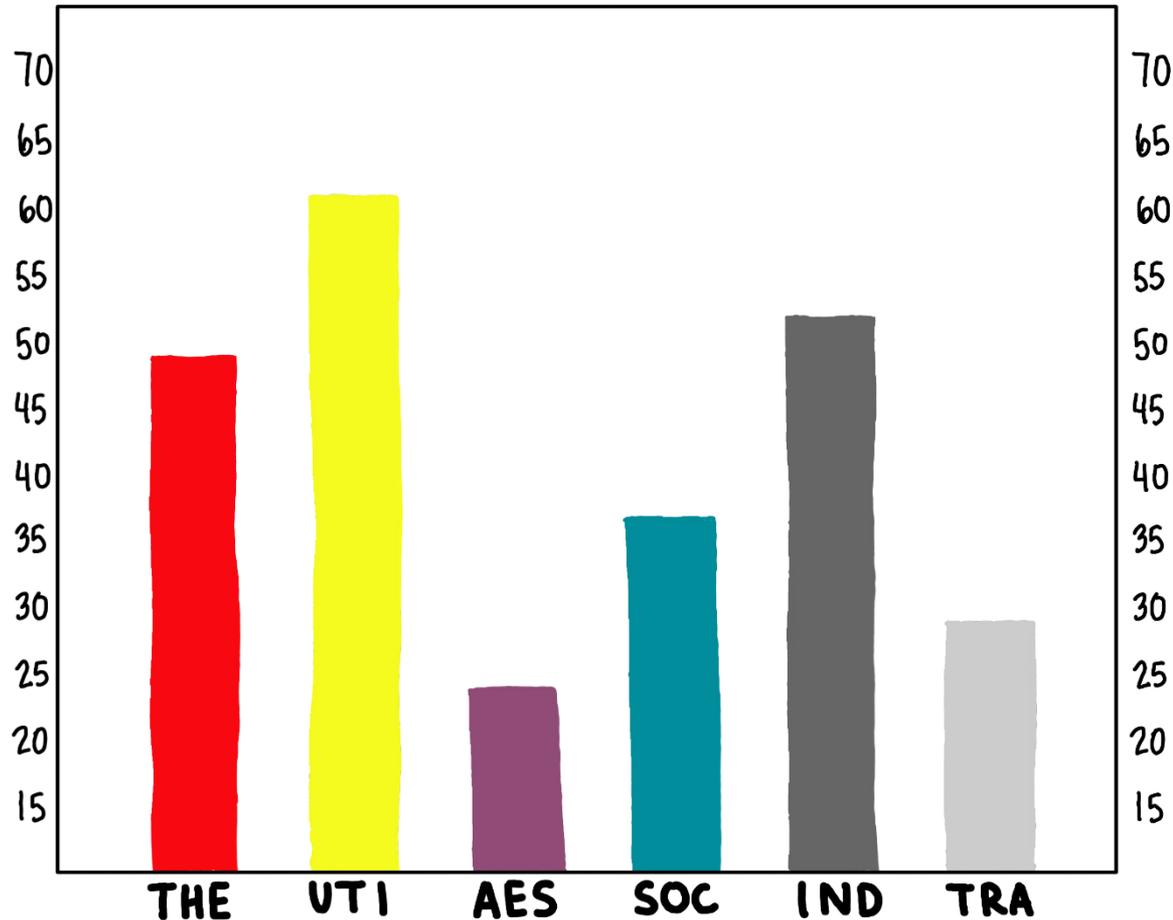
Norm 2012 R4



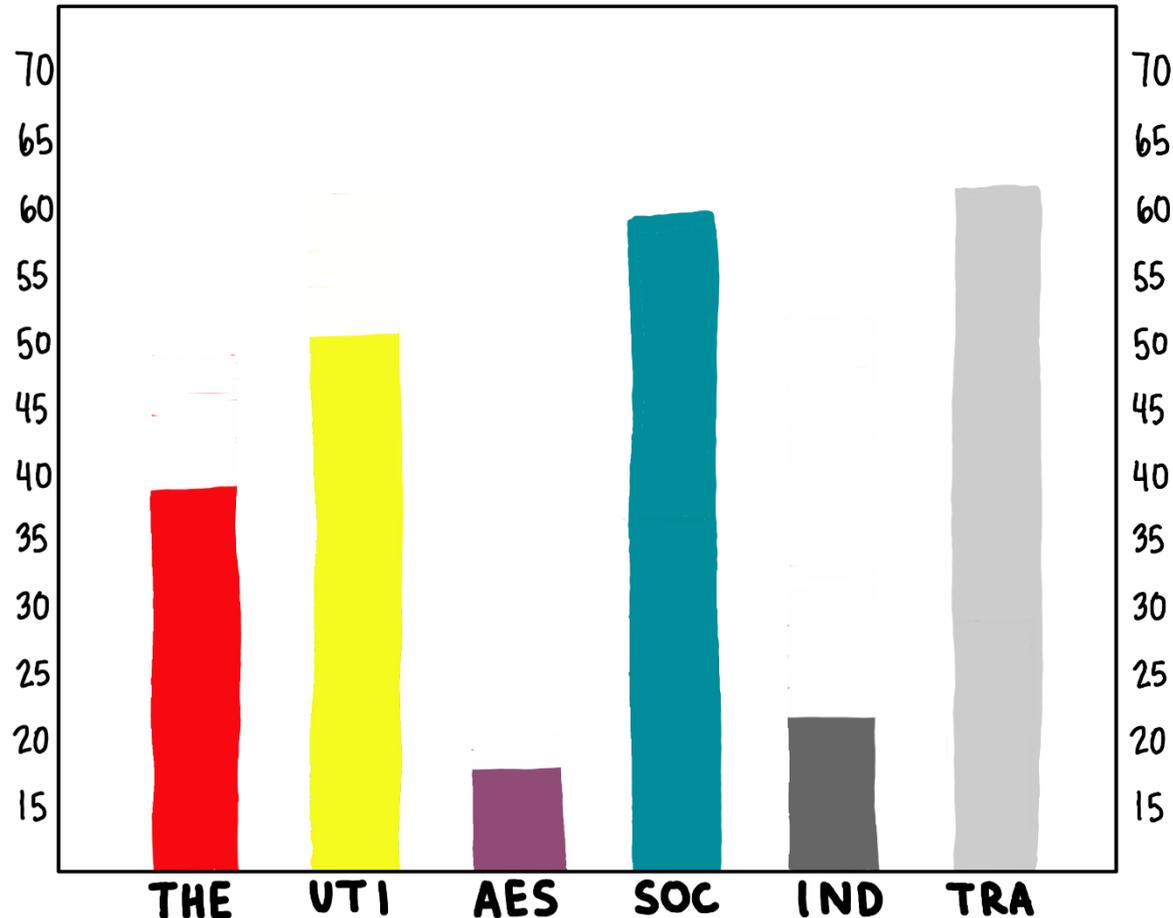
HOW & WHAT

WHY?

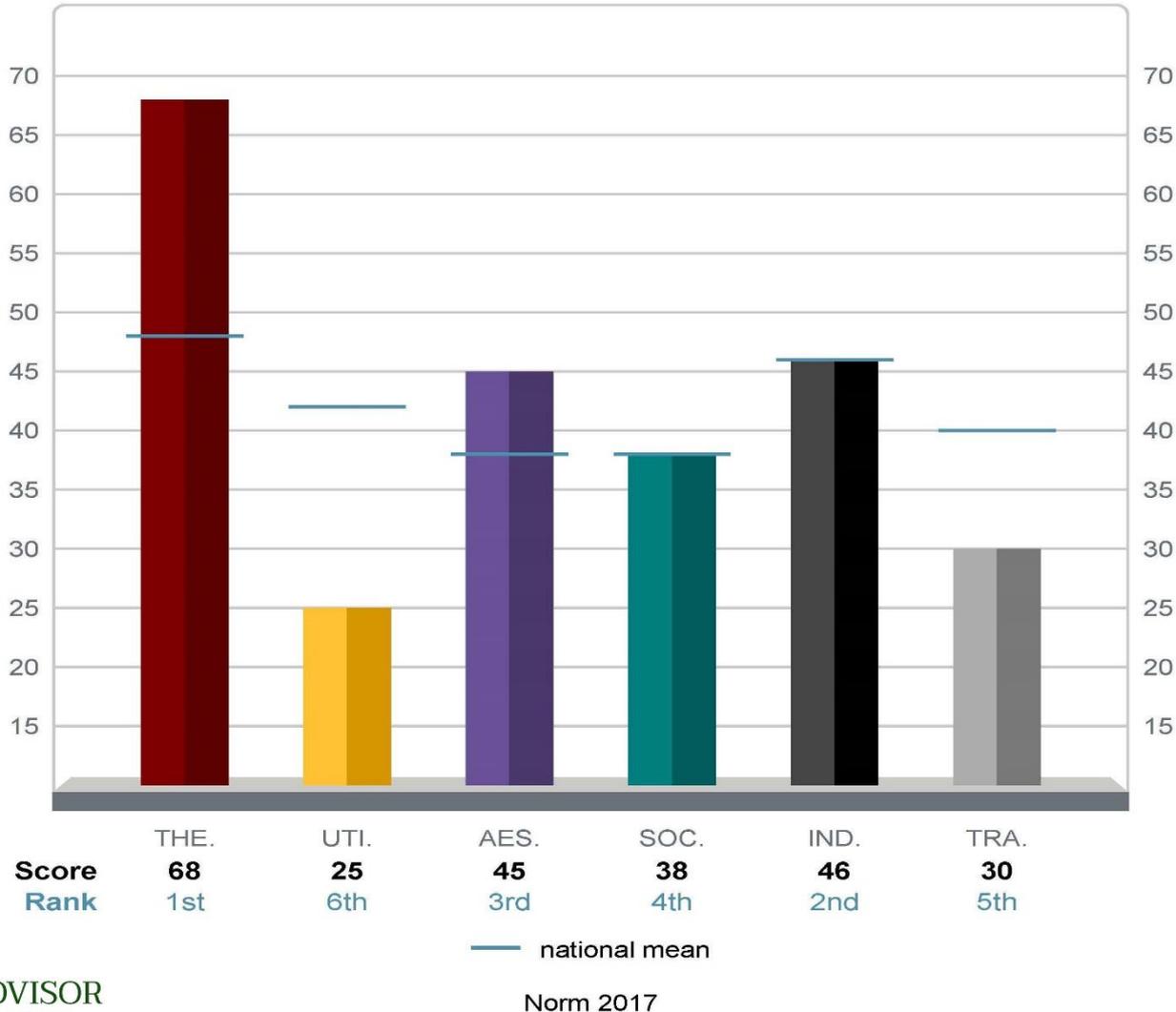
Values Based Business Operating System



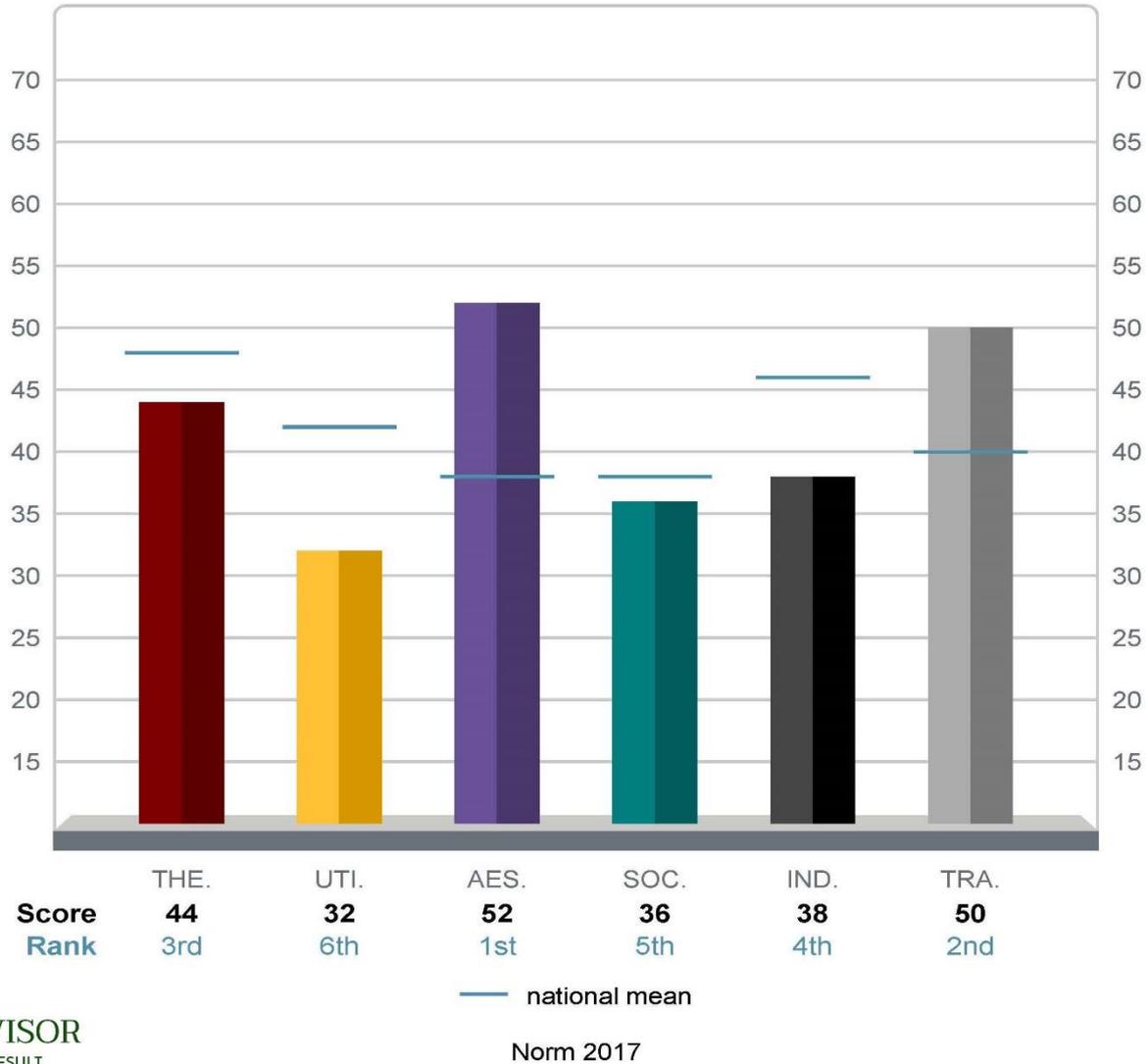
Values Based Business Operating System



Values Based Business Operating System



Values Based Business Operating System



90% WHY NOT?

Worthiness (Need)
Fear (Emotion)
Not Safe (Belief)
Powerless (Belief)
Spiritless (Belief)

+

10% How & What

Vision
Business Plan
Time management
Team Building
Delegation
Marketing & Sales
Customer Service
Product

~~90% WHY NOT?~~

- ~~Worthiness (Need)~~
- ~~Fear (Emotion)~~
- ~~Not Safe (Belief)~~
- ~~Powerless (Belief)~~
- ~~Spiritless (Belief)~~

\$
+ FOCUS
HAPPINESS
TIME

10% How & What

- Vision
- Business Plan
- Time management
- Team Building
- Delegation
- Marketing & Sales
- Customer Service
- Product

“Complimentary VIP Offer”

Values Based Business Operating System

Step 1

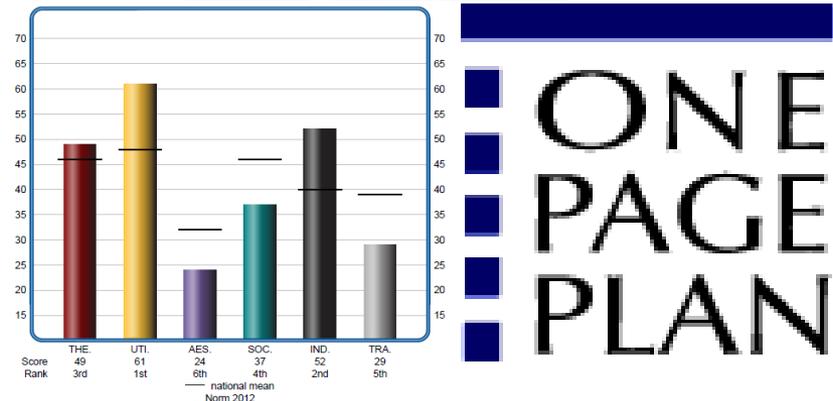
Complete 30-minute Interview
Call with Laura Reilly

Step 2

Complete online Values Based
Business Operating System Assessment

Step 3

Complete 60-minute Assessment
Debriefing with Simon Reilly



sreilly@leadingadvisor.com



Where there is no understanding, there is judgement. Where there is judgement, there can be no understanding or inspiration.

Mindset Practices



Empty your mind



Express values based gratitude



Wake up twice



Breathe and pay it no attention



Forgive mistakes in perception



Stop thinking of self compassion as self indulgence



Meditate



Abbey Gwin
Independent Broker/CFP
Williamsville, NY

“

I am so glad that I started working with Simon and the Leading Advisor Coaching Program when I did. I had been struggling with expanding my mental capacity in terms of growth in my practice. Simon helped me take a different perspective which has truly changed my mindset.

His insights helped me clarify what was holding me back in my career. When I would have a breakthrough Simon would help me put it into action. At a deeper level I learned to integrate these new habits in a continuous habit building format. I appreciate how Simon communicated with me through the process--he was very sensitive to how I needed to receive information to process it. I've lowered my stress level dramatically, expanded trust with my team and learned to pinpoint when I'm self-sabotaging. I have gained tools that will be life-long building blocks both personally and professionally.

”



Robert Clark
Petersen International
Underwriters
Valencia CA

“

Coaching with Simon has not only impacted my business but is contagious to others around me. With only a few one on one sessions ***I have created a 25% increase in income and have had my 4th highest month ever. Simon's coaching approach means a lot to me and I am working with it constantly. Most coaching programs focus on the outside perspective but Simon has focused on working from the inside out.*** This has helped me to understand why my brain works the way it does and has caused an increase in my day to day enthusiasm and heightening my spirit. I have been working diligently on the assignments and with Simon's accountability I have conquered my self-limiting beliefs and have become the leader I set out to be, all while understanding other people on a deeper level and being able to give back to them.

”

“The Leading Advisor Coaching Program has offered me a new perspective in my business and life. Simon’s guidance, resources and experience have helped me to focus and create the vision to drive toward my ultimate goals. With these same resources, I have a better understanding of myself and my business which is helping me to keep an open mind and to not get caught up in the minutia of life. The work I have done through the coaching program has definitely put me in a better position in life and business.”

Wendy Playfair

Freedom 55 Financial

Mississauga, ON





Celine Pastore
Simple Path
Retirement
Palm Harbor FL

“

The Leading Advisor coaching program has set me on fire. I began using the tips provided in the sessions to change the language of my onboarding process and it has made an incredible difference. I have had a 60% increase over last year, in the number of families that I have the pleasure to serve.

The coaching sessions and assignments have helped me to identify who I really am and how to be true to that person. In just 3 sessions the coaching program has already made an incredible difference in my business long term. It has given me the confidence to move into the future and really know how I am going to reach my next goal that I set for myself. The coaching is exactly what I need, exactly when I needed it. I look forward to continuing to improve my team with the program value adds and create sustainable long-term growth.

”

“Complimentary VIP Offer”

Values Based Business Operating System

Step 1

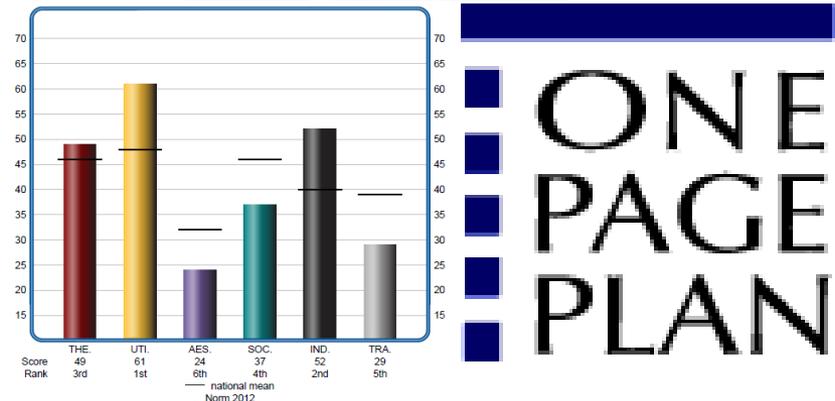
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