

What You Can Expect from this Best Practice

PURPOSE

- To create clarity of purpose for you and your career/business
- To create alignment between your Ideal Life and your career/business
- To provide an accountability mechanism to ensure ongoing implementation of the best practices covered in this program
- To succeed as a Financial Advisor

EXPECTED RESULTS

You will:

- Make more efficient use of the Time, Energy and Money resources to operate your business
- Clearly identify which best practices are well underway and celebrate
- Clearly identify which best practices need your focus and attention to achieve successful implementation
- Measure your progress
- Have increased awareness of the important activities required to ensure your business remains client-centered

ACCOUNTABILITY

You will:

- You will review your professional progress every quarter
- You will review your personal progress every quarter
- You will set new business goals each year
- You will track and monitor regularly to ensure you are constantly progressing towards your goals – professional and personal