

"We are what we repeatably do, excellence then is not an act but a habit."

- Will Durant

5 Core Mindsets:

On scale of 1-12 rate:

Two actions you can take between now and 12/31/23 to get closer to your goal:

READINESS

This mindset prepares you to confidently meet unforeseen financial challenges by having a buffer.

Where are you NOW?
1 2 3 4 5 6 7 8 9 10 11 12
Where do you WANT to be on 12/31/23?
1 2 3 4 5 6 7 8 9 10 11 12

WELLNESS

This mindset prioritizes physical and mental health, allowing you to live the life you envision.

Where are you NOW?
1 2 3 4 5 6 7 8 9 10 11 12
Where do you WANT to be on 12/31/23?
1 2 3 4 5 6 7 8 9 10 11 12

FOUNDATION

This mindset encourages you to have key protections in place to establish a safety net for you and your loved ones.

Where are you NOW?
1 2 3 4 5 6 7 8 9 10 11 12
Where do you WANT to be on 12/31/23?
1 2 3 4 5 6 7 8 9 10 11 12

CARING

This mindset helps you ensure your loved ones can easily find and access crucial documents, passwords, and accounts.

Where are you NOW?
1 2 3 4 5 6 7 8 9 10 11 12
Where do you WANT to be on 12/31/23?
1 2 3 4 5 6 7 8 9 10 11 12

PARTNERSHIP

This mindset works to build trust between you and your clients.

Where are you NOW?
1 2 3 4 5 6 7 8 9 10 11 12
Where do you WANT to be on 12/31/23?
1 2 3 4 5 6 7 8 9 10 11 12

Recommended Books

- Unreasonable Hospitality: Will Guidara
- 10x Is Easier Than 2X: Dan Sullivan and Dr. Benjamin Hardy
- Who Not How: Dan Sullivan and Dr. Benjamin Hardy
- Bel Canto: Ann Patchett

Recommended Podcasts

- DAM Livestreams
- Top Advisor Marketing Podcast
- Kelly Corrigan Wonders
- Simon Sinek: A Bit of Optimism
- Ted Talks

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