



VISION EXERCISE

LIFE VISION | Now & 10 YEARS+

"All my life I wanted to be somebody. Now I see I should have been more specific." – Lily Tomlin

LIFE VISION

Start with LIFE VISION: this will bring relevance to your BUSINESS VISION

What do you hope your LIFE embodies today? How does this change, if at all, in 10 years?

- ☐ Where are your children/dependents [if applicable] in their lives? How are you involved in their daily schedules?
- ☐ Where is your spouse/partner [if applicable] in life? How & When do you live life together?
- ☐ Who are your friends/relationships? How important are they? How much time do you spend?
- ☐ What role does Physical, Emotional, Spiritual health play? What does it take to achieve this?
- ☐ What does "community" mean to you? What does it take to achieve this?
- ☐ What do you do for FUN?! Where do you spend Time and/or \$? What does it mean to indulge?
- ☐ What does your ideal PERSONAL calendar look like?

What level of income do you hope to achieve? Why?

- ☐ When considering your own financial planning and what you hope to see for you own lifestyle (how you live, what you provide to family, what you give, etc), what is the income level you ideally desire?
- ☐ How important is lifestyle enjoyment v. sacrificing time to accelerate growth of the business?
- ☐ How will other sources of income beyond your financial practice play a role, if at all?
- ☐ Do you love the idea of as much recurring/passive income as possible with minimal effort? Or do you possess a competitive internal drive that will always lead to your efforts to "keep growing" with exerted effort?

What are some non-negotiable items that must exist personally in your journey towards BUSINESS success?

- ☐ What can you do to ensure these are not compromised?

BUSINESS VISION BELOW ...



BUSINESS VISION | Now & 10 YEARS+

What does BUSINESS success look like now? What about in 10 years? Consider the following questions:

- ☐ What brings you the greatest fulfillment professionally?
- ☐ What does your ideal BUSINESS calendar look like? Be specific...
 - Do you meet with clients- which ones/how often in the office/ do you develop advisors?
 - What professional activities do you hope to never have to do?
 - What professional activities energize you/fulfill you?
- ☐ How important is it to build something on your own? How important is to have control over decisions?
- ☐ If building & maintaining full control are important, how much personal time & emotional expense are you willing to sacrifice?
- ☐ What excites you more- building a large enterprise, or continuing to grow a smaller more nimble practice that continues to increase profitability over time? What about each model is attractive or unattractive to you, and why?

What would your client model look like? [Acquisition & Service]

- ☐ Who are your clients? How many are you adding each year? What does the relationship involve?
- ☐ Do you want to impact a broad scope of clients or a deeper impact with fewer? If a combination of both, how many team members would you want to take on/manage/be responsible for to reach a broad scope of clients?
- ☐ What degree of infrastructure are you willing to create/manage? How does this impact the clients you serve?

What does your physical office look like? Where is it?

What would it take organizationally to focus on your greatest fulfillments & your ideal calendar?

- ☐ Who does what, what degree of control do you want/have, etc?
- ☐ What do you anticipate it would take financially to accomplish this?

Why does accomplishing this level of success matter to you personally & professionally?

- ☐ May seem obvious, but it is important to articulate.

Who are your critical people?

- ☐ If you could pick any 3 individuals on the planet to play a critical role in your organization, who would they be, what characteristics made you select them, how will these characteristics impact your success?
- ☐ Is it critical to have these individuals immediately? If not, how will you know the right time to search for them? [Expense ratio? Revenue? Etc?]

What other questions have arisen during this exercise that you want to contemplate?