

MODULE 2

Creating Vision



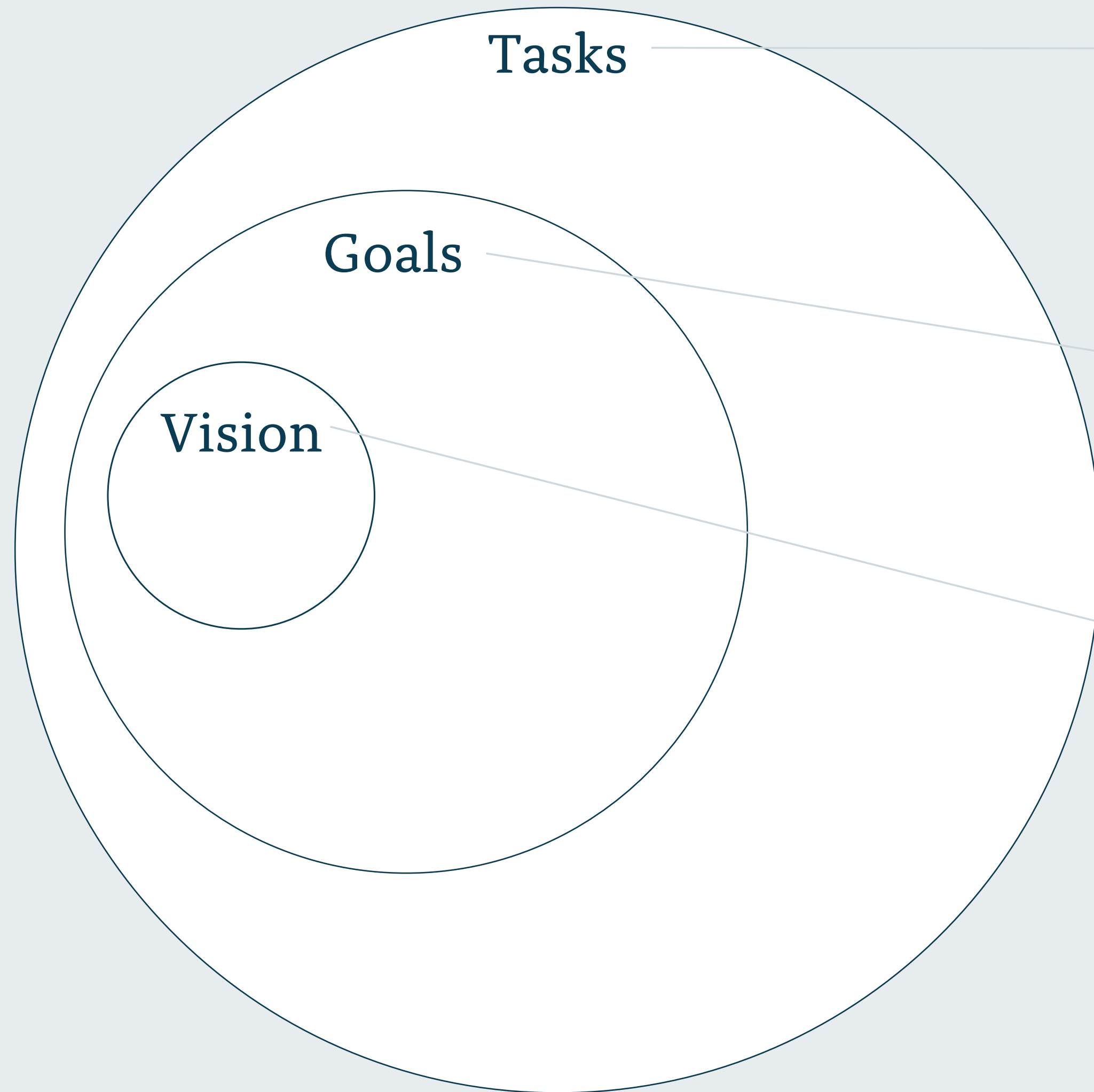
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Why Vision?

- You live in vision or you live in circumstance
- Everything you do happens twice – first in your mind, and then in reality
- Vision starts with a big question – “What if?”
- Your vision provides you, your firm, and your teams clarity on shared goals
- Your vision should be about more than money – it should help you continue to be the best even when times get tough
- You protect your vision by upholding your standards
- Vision becomes a filter that allows you to prioritize what you should do, it also allows you to easily understand what tasks initiatives to avoid



Without vision, your daily tasks amount to “busy work” rather than purposeful work

- You don't get meaning from your job, you bring meaning to your job

Your goals are the actions and benchmarks to help you achieve your vision

- Set, evaluate, and reevaluate your goals consistently for 90 days
- Goals help you be purposeful
- “Because goals” are the goals you embed and reinforce until they become involuntary

Your desired “north star”. This is the thing that keeps you going and motivates you

- Ask “What if?”
- Set clear standards for yourself and teams
- Get comfortable getting uncomfortable to achieve your vision

It can sometimes be difficult to sit down and write out your vision or north star.

A good way to uncover it is to work backwards.

Starting at the top, write down as many things that relate to what you do.

Think of all the tasks you take on in the day and write them down.

Once you have your tasks look for patterns. Do these tasks point you back to certain beliefs or values?

For example – maybe you appreciate explaining concepts to your clients because you believe in the power of educating others.

Once you have your values, see if these share a common theme. Ask – can these values be summarized into a word or phrase? If they can, that’s a good signal that you’ve landed closer to your purpose. Write out this word or phrase and refer to it as often as you need.

1 What I do (tasks):

2 What I believe (Write out 3-5) (values):

3 Why I do what I do (vision):

What's your client's vision & mission?

Use this worksheet to uncover the things that motivate your clients and their vision.

<p>Family Include the entire family and ask plenty of questions:</p> <p>What is the makeup of their family?</p> <p>What drives their family dynamics?</p> <p>What are their hopes for their family?</p> <hr/> <hr/> <hr/>	<p>Organization Which organizations are your clients affiliated with?</p> <p>Why do they participate with these organizations?</p> <p>What values propel these organizations that your client shares?</p> <hr/> <hr/> <hr/>
<p>Recreation What do they do with their free time?</p> <p>What do they enjoy doing for themselves?</p> <p>What recharges them?</p> <hr/> <hr/> <hr/>	<p>Mission What gets your client out of bed in the morning?</p> <p>What is your client's overarching mission?</p> <hr/> <hr/> <hr/>



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