

Welcome to the Extraordinary Advisor Program – We’re so glad you’re here!

During the seven sessions of the program we’ll be on a journey to becoming an Extraordinary Advisor. I really should say an *even more* Extraordinary Advisor. I know you are already extraordinary because you are here. You’ve invested the money and committed the time to grow and learn. This is no small matter. It is a commitment to be even more present, a better communicator, an inspiring leader with greater influence and to making a positive difference for yourself, your family, your clients, and your community. Most don’t make this commitment in themselves to explore and learn. But **you** have.

Here are a few suggestions for making the most of our time together:

- **Whenever possible be on our live sessions.** Yes, you’ll get links to the recordings. I know it might not be possible to be at each and every session live, but when you can be there live you will get so much value. You’ll have the opportunity to meet and connect with other participants. You’ll have the ability to ask questions as the sessions are happening. And, you’ll have worked on much of the material during the sessions, optimizing your time.
- **You don’t need to work ahead in the workbook.** We’ll be doing many of these activities together. There are also activities in the workbook that we won’t have time to work on together in class. If you are interested, these may be helpful for you to work on in between sessions. *There are however a few questions to look at now to help you prep for the masterclass which you’ll find in the next section.*
- **When you are participating in the sessions (whether live or recorded) please give them your full attention.** It is so easy to be tempted to multi-task when you are on a virtual meeting. These sessions are designed for positive transformation, and the more you can be with us in mind and body the better your results will be. Whatever you are dealing with can most likely wait. Your time and focus are part of your investment in you.
- **Connect with the other participants.** When I was an advisor, other advisors supported my business in wonderful ways. I learned from them. I bounced ideas off of them. I referred clients to them when someone wasn’t a good fit for me and sometimes I got referrals from other advisors as well. Make sure to note the names of people you interact with during this program. After our sessions, reach out and connect on LinkedIn. Perhaps set up connection calls with the advisors you meet. I know it seems easier to do this when you’re at an in-person meeting – but great professional relationships can develop online as well.
- **Come with a *beginner’s mind*.** You bring deep experience with you to this course. There are times you may think “Oh, I know this.” In my experience these 4 words prevent me from learning all I can learn. They shut down my ability to learn something new or discover an important nuance to a way I’m doing things that could really help. When you have a [beginner’s mind](#) you are open to seeing things as if it’s for the first time

without any preconceived ideas about how things work, and without expectations about what's going to happen. Be super curious and open to what's possible.

What You'll Need:

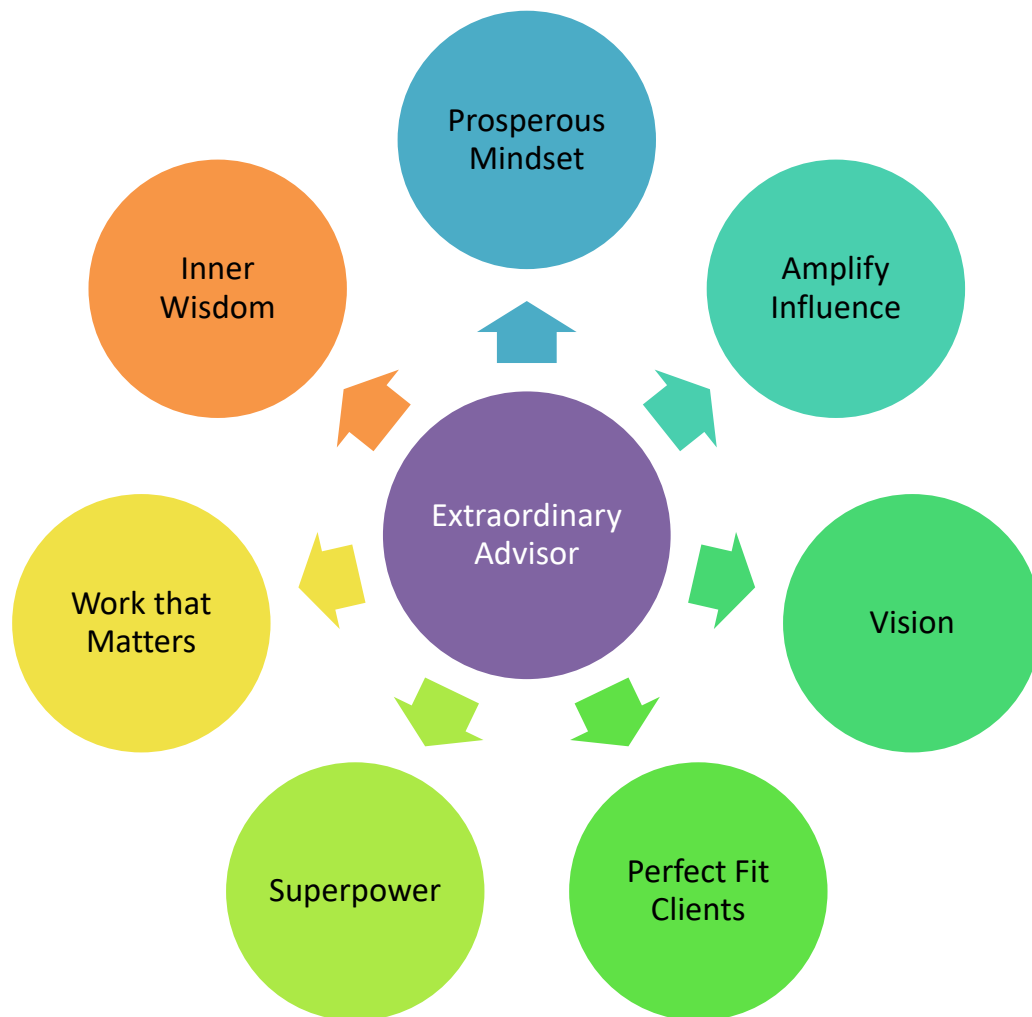
- **A Journal** – You will be journaling during the program. You can do this in a separate book or notebook. There are benefits to handwriting while you are journaling. You can also choose to set up a separate document to track your writings for this masterclass. I tend to journal on my laptop – it seems to work well for me. You decide what works best for you. Another option is using an app such as [Evernote](#) which if you're not already using you should check it out! There's a free and paid version. I used the free version for a long time and use it so much I upgraded to the paid version.
- **A Notebook** – You may want to keep this separate from your journal and use it to take notes during our time together. You can do this electronically or old school. Or you can use this workbook to track all of your notes. Again, you decide how it's going to work best for you.
- **Your Sunny Disposition** – Sorry I had to put this in ... are you gagging just a little? This was always an item on our daughter's packing list for summer camp. Every year I'd ask her if she had packed it. And every year she rolled her eyes at me. Still, I think it's always good to have a positive mindset. Optimists do better at sales and tend to live longer (more on this <https://bit.ly/sunnydisp>).

Thank you for being part of the Extraordinary Advisor program. I'm looking forward to working with you and seeing your business and personal visions come to reality.

Every good wish,

Ellen

Overview –



The 7 part “Extraordinary Advisor Framework” is designed to show you how to:

- Become a leader your clients and team want to follow
- Identify a superpower that will differentiate and grow your business
- Boost your emotional intelligence to become more authentic and resilient
- Attract more of the clients you want to work with (and avoid the ones you don’t)
- Master the communication skills that charm prospects and soothe clients
- Manage the stress of volatile markets, panicked clients, and lifestyle disruptions
- Ignite your insights, imagination, and intuition to turn your vision into reality
- Bring deeper meaning to your work and greater joy to your relationships

Pre-Course Exploration:

Having clarity on your intentions for the course will assist you to maximize your learning and results. Completing this section is not required but suggested. Actually, that is the case for the entire program. It is all up to you. There will be suggestions made that are easy for you to complete or try. Others might feel like they aren't for you. You decide. I do suggest that if you decide not to do something you do so deliberately and consciously. For example you may say, "oh I hate journaling, I've tried it before and it doesn't work for me." Then skip it... OR ...look at what your resistance is and decide if it's worth pushing through to see if you discover something valuable.

You will not be asked to turn in or share your answers to these questions – they are for your benefit.

What does it mean to you to be an Extraordinary Advisor?

What do you think might be holding you back from being your version of an Extraordinary Advisor?

For each question below rank how you feel you exhibit this on the following scale:

1 = Not at all

2 = Sometimes, but could do much better

3 = I'm often this, but would love to grow more

4 = I rock this all the time

	Rank
1. I invest in my professional development	
2. I am a master of my mental mindset	
3. Deep client listening is a core competency	
4. I frame conversations so clients will/can listen	
5. I include service to others in each goal that I set	
6. I create a work environment where team members never want to leave	
7. I'm clear on my superpower and use it for good	
8. I use my intuition frequently in business	
9. I attract the kinds of clients I want to work with	
10. I remain calm and clear even in chaotic or challenging times	
11. I stand by my beliefs and am known for my convictions	
12. I have a well-thought-out business manifesto	

13. I take pains to create and maintain a stellar reputation	
14. My work is aligned with my values	
15. I make people feel better about themselves just by being in their presence	
16. I am clear and specific on how I provide extraordinary value to my clients	

Other Questions to Explore:

What is the one thing that if I were to do this consistently in my business, I know my business would improve:

What's keeping me from doing this in my business on a regular basis is:

What is the one thing that if I were to do this consistently in my personal life, I know it would improve:

What's keeping me from doing this in my personal life on a regular basis is:

The things I know I'm really good at in my business are:

Session 1: How to Build a Winning and Prosperous Mindset

Overview: In the new reality we are living in, the difference between those who excel and prosper and those who languish does not lie in their technical knowledge, niche, or even their marketing strategies. It's based upon having the right thoughts, beliefs, and habits that lay the foundation for success.

Concepts explored: Mindfulness, Stress Management, Meditation

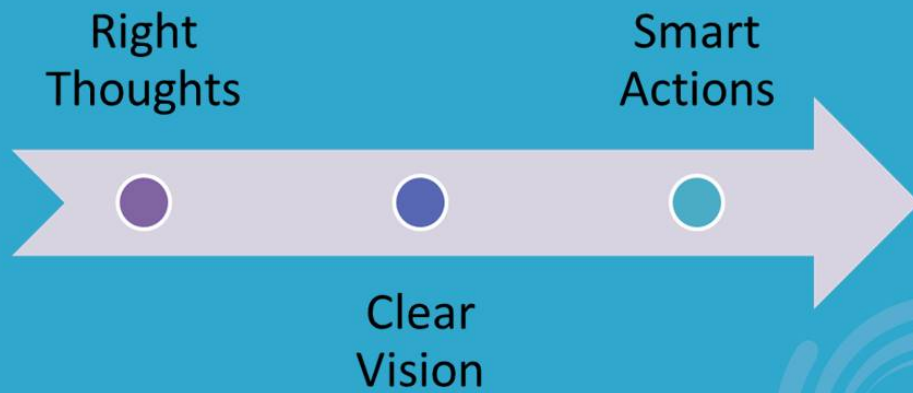
What you'll learn:

- How to build your mental conditioning for success
- Ways to use mindfulness to grow your connections with others
- How to overcome internal roadblocks to your business growth

Tools & Resources you'll get:

- Resources for super-quick ways to incorporate mindset training in your daily life
- A script for how to start meetings with your team to get everyone's head in the game

Being an Extraordinary Advisor



Create Great
www.ellenrogin.com

Activities

Right Thoughts

What I believe about...

My competency as an advisor:

Helpful

Unhelpful

My current business:

Right Thoughts

Helpful

Unhelpful

What I believe about...

Prospecting:

How the current economy/
markets will affect my business:

My team:

Notes:

Business Brain Audit

(Inspired by Medium article by Rosie Spinks <https://bit.ly/businessbrainaudit>)

Things I have to do	Things I want to do	Things I <i>need</i> to do
Sales Run client meetings Do employee reviews	Run workshops Write a book Read books at Emma's school Run a marathon Have lunch with my friends	Exercise regularly Take vacation Meditate
Things that must get done	Things I want done	Things I <i>need</i> done
Compliance Pay employees Pay taxes Books and records Client calls returned	Social media Redecorate office Client birthday cards My house cleaned	Office clutter cleared Joyful communication Flowers in the office Weekly team meetings

Things I have to do	Things I want to do	Things I <i>need</i> to do
Things YOU must do or there will be big problems	Things you'd like to do	Things you need to do to keep you energetic and able to do everything else
Things that must get done (that others can do)	Things I want done (that others can do)	Things I <i>need</i> done (that others can do)

Inspired by Rosie Sparks

For each item listed decide:

Dump – You really don't need/want/have to do (and don't really want to)

Delegate – You want it done but *you* don't need to do this

Delay/defer – Put this off until later - postpone

Decrease – Keep but do less of it (shrink, downsize, reduce, pare down)

Deliberate dedication/Deem worthy - Keep

Gain Traction Through Action

- **Practice:**

- If you are new to meditation:
 - Download a free app (suggestions are included in the following pages) – Ellen’s favorite is [*Insight Timer*](#).
 - Listen to guided meditations 3 times this week.
- If you’ve meditated in the past, but not recently or consistently:
 - Commit to meditating 3 times this week.
- If you are an experienced committed meditator:
 - Set a challenge for yourself. For example, if you have a regular 1 time per day practice, consider trying 2 times per day. Or, if you have a particular style of meditation you practice, try a different style.
- Say “cancel/clear” when you catch yourself thinking a limiting thought or saying a negative statement.
- Start a “feel good file” (electronic and/or paper file) to save and savor positive messages you receive about how you have impacted/helped people in your life.

- **Journal:**

- Consider using one of these prompts:
 - What I love about my business is
 - What I hate about my business is
 - I know I’d be happier if

- **Notice:**

- When you are saying negative/judgmental statements about:
 - Clients
 - Team members
 - The economy
 - Your business
 - People in your personal life

- **Connection:**

- Extraordinary Advisors I’m inspired to connect with:
- Clients I’m inspired to reach out to:
- Business Contacts I’m inspired to reach out to:
- Personal Contacts I’m inspired to reach out to:

- Other things I'm inspired to take action on:

Resources for more learning

Script for “arriving” at team meetings

Let's just take a few minutes to *arrive* before we start our meeting so we can get our heads and our bodies in the same place. Get in a comfortable position in your chair. Sit in a way you feel relaxed and still alert. You can do this with your eyes open gazing down gently or with your eyes closed, whatever feels most comfortable to you.

Start by taking in a few deep breaths. Noticing the inhale and noticing the exhale. See if you can keep your attention on your breath. Gently letting go of anything that was happening before you got here and anything that will be waiting for you when we are finished here. Notice where in your body you feel the breath. Maybe it's the air coming in through your nose and leaving through your mouth. Perhaps it's the rise and fall of your belly with each inhale and exhale. Or maybe you notice your entire body breathing. When your mind wanders, gently bring it back to your breath.

Now bring your attention to where your body is being supported by the chair. Feel your feet on the floor. Notice if your shoulders are relaxed or tight. See if you can relax just a bit more.

PAUSE

Let's take three final breaths together. On the first breath notice the breath. On the next breath relax the body. On the third breath, silently ask yourself “What's important now?”

PAUSE

And, when you are ready gently open your eyes and bring your attention back.

Books, Apps and Videos:

<https://www.ellenrogin.com/mindfulness/>

Ellen's Favorite Resources to support your ongoing Mindfulness and Mindset Boosts:

Podcasts:

Untangle Podcast *from Meditation Studio* <https://meditationstudioapp.com/untangle>

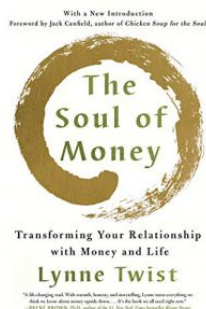
10% Happier Podcast *with Dan Harris* <https://www.tenpercent.com/podcast>

The School of Greatness *with Lewis Howes* <https://lewishowes.com/sogpodcast/>

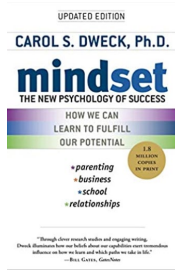
Apps/sites:

- Insight Timer (*Ellen's favorite*) <https://insighttimer.com/>
- Headspace <https://www.headspace.com/>
- Calm <https://www.calm.com/>
- 10% Happier <https://www.tenpercent.com/>
- Waking Up (*Sam Harris*) <https://wakingup.com>
- Meditainment <https://www.meditainment.com/>
- WorryDoll App <https://worrydolls.app/>
- Karunavirus <https://karunavirus.org>

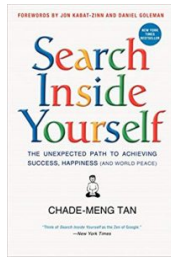
Books:



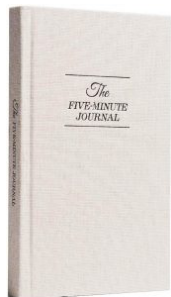
[***The Soul of Money: Transforming Your Relationship with Money and Life***](#)
by Lynne Twist



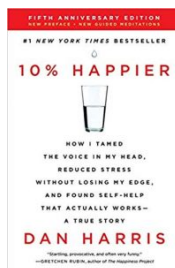
[Mindset: The New Psychology of Success](#)
by Carol S. Dweck, Ph.D.



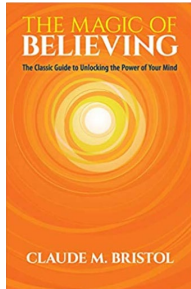
[Search Inside Yourself: The Unexpected Path to Achieving Success, Happiness \(and World Peace\)](#)
by Chade-Meng Tan



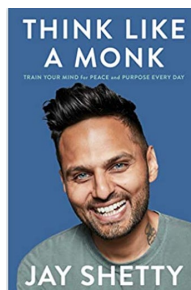
[The Five-Minute Journal](#)
by Intelligent Change



[10% Happier: How I Tamed the Voice in My Head, Reduced Stress Without Losing My Edge, and Found Self-Help That Actually Works – A True Story](#)
by Dan Harris



[The Magic of Believing](#)
by Claude Bristol



[Think Like a Monk](#)
by Jay Shetty

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Courses:

Search Inside Yourself Leadership Institute — <https://siyli.org/>

Articles:

<https://www.horsemouth.com/a-secret-weapon-that-builds-your-business-in-10-minutes-a-day>

A Secret Weapon That Builds Your Business in 10 Minutes a Day

By Ellen Rogin, CPA, CFP®

A recent study found that advisors are 23% more stressed than most people. Does that sound about right? How will you stay resilient, focused and growth-oriented when the inevitable next recession hits?



Being a financial advisor is ranked ninth in top business jobs for 2019 by [*U.S. News & World Report*](#) (and 44th for all jobs). Good income, growth potential and job flexibility all play a role in this high ranking.

Along with those positive factors, this profession also comes with above-average stress. According to FlexShares Advisor Wellness Report, advisors are 23% more stressed than the general population.

What's stressing out advisors? Well, competing for clients, compliance issues, and political and economic issues top the list.

Here's the thing—these stresses aren't going away. Add on other pressures such as market fluctuations and how fintech is changing every way you'll work with clients in the future, and most advisors will feel the tension.

Some stress is a good thing, right? Do you think it drives your success? You might want to reconsider this. Experts report that slow-burning stress, anger and other negative emotions can actually kill you. It can also be toxic for your relationships with clients, your team—and at home. When you're experiencing fear and anxiety others can feel this as well. You emit a "[fear pheromone](#)" when you're anxious and it's contagious. Your stress can act like an infectious plague affecting those around you.

What to do about stress

OK, if the stressors don't go away, then the only thing that you can control is how you deal with them. Wouldn't it be cool if you could do something that not only cushions the stress but also helps you grow your business? Ta-dah! Here's what's worked for me and many, many others...incorporating a mindfulness practice into your daily schedule might just be your secret weapon.

Let's start with this question: What is mindfulness anyway? A simple definition is: Being aware. We are often running on autopilot. It's estimated that 47% of the time our minds are wandering. That means that almost half of the time you're thinking about something other than what's happening in the present moment. This raises the question: What might you be missing? Is it an important cue a client is giving you? Maybe a comment from a disgruntled employee? Or, how about really being present with your kids or partner?

Here's a more expansive definition from [The Mindful Nation U.K.](#) report: "Mindfulness means paying attention to what's happening in the present moment in the mind, body, and external environment, with an attitude of curiosity and kindness."

A great way to practice mindfulness is through meditation. Just like with exercise, there are many different styles of meditation. Whether you like Zumba, kickboxing, or cycling it's important to find the exercise practice that you enjoy. And it's the same with meditation. For many years I practiced Transcendental Meditation, while more recently my practice has shifted to mindfulness meditation typically [focusing my attention](#) on my breath.

I know that my meditation practice helped me be more successful in business. Clients and staff felt more comfortable and calm. I think it helped me read my clients more effectively and this had a direct positive impact on the bottom line. I know it helped me be a better wife and mom too.

Research backs up meditation's benefits

Research backs up the benefits. Meditation can change the structure and functioning of your brain to allow you to not only [be less stressed](#), but less reactive. And it helps you develop a greater ability to control mind-wandering. Perhaps it's not the latest time management strategy that will help you [be more productive](#), but actually spending time daily meditating.

Here's a quick and fun video on why meditation is the new superpower by news anchor Dan Harris. He came to meditation after having a panic attack on live T.V. while doing the news on *Good Morning America*.



Source: [YouTube](#)

Companies like Google, SAP, and Aetna know the importance of these skills and have implemented training for their teams. Google started their Search Inside Yourself program and it was so incredibly successful they had thousands on the waiting list to get into the course. They have since spun off this initiative to a separate non-profit and the [workshop](#) is now being given around the world. A great book to get you started is based on their program: [Search Inside Yourself: The Unexpected Path to Achieving Success, Happiness \(and World Peace.\)](#)

Don't be intimidated

Starting a meditation practice doesn't have to mean sitting cross-legged like a pretzel on the floor for an extended period of time. You can begin with a few conscious breaths; just noticing your in-breath and noticing your out-breath. As your attention drifts off with your thoughts (which for just about everyone it will) simply and gently bring your attention back to your breath. Inhale and exhale.

You might consider taking a class to start your practice or using one of the many apps available with guided meditations. Here are a few to consider:

[Insight Timer](#)—this is my personal favorite and I've used it for years. It is free (although there is an upgraded version I purchased). There are thousands of guided meditations, courses and music.

[Headspace](#) and [Calm](#)—two additional very popular apps with much content to choose from.

[10% Happier](#)—this is Dan Harris' app (the news anchor mentioned above)

When I work with teams to incorporate more mindfulness into their daily lives and their leadership practices I often say “sometimes you need to slow down to speed up.” Your ability to be more present in every aspect of your life can be one of the most important, foundational skills to master for your success and happiness.

Meditation as a Financial Strategy by Ellen Rogin, CPA, CFP®

Meditation is one of my favorite financial strategies. It may sound weird, but if you think about it, how can you make sound business decisions if you are jittery, stressed out, and distracted? When I started my meditation practice about 16 years ago I used an egg timer to let me know when I'd reached my 18 minutes of meditating. Now there are lots of cool apps to get you started and move your practice along.

Here are some of my favorite meditation apps:



Insight Timer –

I've used this one for years. It allows me to set calming tones to begin & end my meditation. They also have thousands of guided meditations of all different lengths. I've been enjoying a guided yoga nidra meditation for sleep. I've actually never heard the entire thing as I'm out before it finishes! You can track your sessions; as of writing this I've been using the app for more than 9 years and have tracked 2606 days with at least one session on this app. There's a cool community with this app, too. You can see how many people are meditating at the same time as you. There are different versions, many of them are free. insighttimer.com



Calm –

People swear by this one. Seems to be a great way to get started in a meditation practice. I've referred several people to this app & they've jumped in and started meditating on a regular basis where prior to using Calm it was a struggle. They have a variety of meditations & programs with varying lengths. Perfect if you only have a short time to meditate. You can try it for free & if you like what you hear, get a subscription &

unlock more of the meditations. It's about \$59.99 per year – Not bad for a year of peace and serenity. calm.com



Headspace –

Learn to meditate and live mindfully. Hundreds of themed sessions on everything from [stress](#) and [sleep](#) to [focus](#) and [anxiety](#). Bite-sized [guided meditations](#) for busy schedules. Even SOS exercises in case of sudden meltdowns. headspace.com



Ten Percent Happier –

With the Ten Percent Happier app, you'll discover guided meditations and practical teachings you can carry anywhere. Learn to meditate from the world's top mindfulness experts. tenpercent.com



Waking Up–

A meditation course for beginners and experienced alike. Waking Up is for anyone who understands that meditation should transform one's view of the world. wakingup.com

<https://www.ellenrogin.com/mindfulness-business-strategy/>

Why Mindfulness Might be Your Best Business Strategy

by Ellen Rogin, CPA, CFP®

Do you ever worry about growing your business, or your job, or the economy?



At some point ... of course you do! We live in a constantly changing, and evolving world. For most people at some point this causes some level of worry or stress. Being freaked out is not only terrible for your health and your relationships, but it is also really bad for business.

Here's the thing – these stresses aren't going away.

Some stress a good thing, right?

But do you think it drives your success? You might want to reconsider this. Experts report that slow burning stress, anger and other negative emotions can actually kill you. It can also be toxic for your relationships with clients, your team and at home.

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Okay, if the stressors don't go away then the only thing that you can control is how you deal with them. Wouldn't it be cool if you could do something that not only cushions the stress but also helps you grow your business? Ta-dah! Here's what's worked for me and many, many others ... incorporating a mindfulness practice into your daily schedule might just be your secret weapon.

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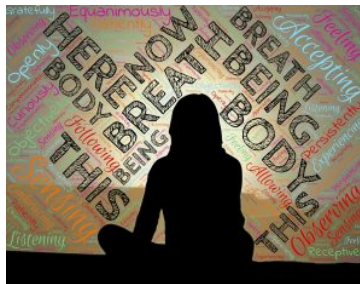


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Practicing mindfulness

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Simple ways to start meditating

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Session 2: Amplify Your Influence: How to Communicate So Your Clients and Team Will Listen

Overview: You have great advice to share, yet clients can't always hear what you're saying and sometimes don't act on your suggestions. With all of the challenges in the world today, communication is getting even more difficult. You can be an even more powerful communicator if you know the steps to take.

Concepts explored: Mindful Listening Skills, Empathy

What you'll learn:

- What to do to get your clients present and clear to hear what you have to say
- How to hear what clients mean but aren't saying
- How to listen and communicate when talking to groups

Tools & resources you'll get:

- The top 10 questions to ask to build even deeper client relationships

Activities

Ten Questions to Ask to Build Deeper Client/Prospect Relationships:

1. What do you feel really good about in your financial life?
2. What could be even better?
3. Tell me more about that?
4. What else?
5. It really helps me work with people when I understand how money has impacted them and played a role in their lives. What is your earliest memory involving money?
6. How was (or wasn't) money talked about in your home growing up?
7. You know, I was thinking about something this morning that I was grateful for (and then share with them). What are you feeling grateful for?
8. If it were 2 years from now, how would you know you were really thrilled with our working relationship?
9. Imagine what your life could be like in 5 years? Tell me about it? Where are you living? What type of work are you doing? How are you feeling? Paint a picture for me.
10. What questions do you have for me? (Notice you've asked "what questions do you have for me," not "do you have any questions." This leaves room and space for them to ask.)

Notes:

Gain Traction Through Action

- **Practice:**
 - Continue to incorporate meditation into your routine.
 - Empty your thoughts before your meetings.
 - Use some of the 10 questions during conversations.
- **Journal:**
 - Consider using one of these prompts:
 - What's on my mind is
 - What I'm concerned about is
 - How I can add value today is
- **Notice:**
 - Post-meeting communication review process. After client meetings, review the following:
 - Was I present?
 - Did I talk too much?
 - Was I thinking about my next question or was I listening to them?
 - How did I feel?
 - How do I think the client felt?
 - What was my mindset going into the meeting? During the meeting?
 - Is there a clear next step or call to action for the client? for me and my team?
 - What could I do better next time?
- **Connection:**
 - Extraordinary Advisors I'm inspired to connect with:
 - Clients I'm inspired to reach out to:
 - Business Contacts I'm inspired to reach out to:
 - Personal Contacts I'm inspired to reach out to:
- **Other things I'm inspired to do:**

Resources for more learning

Interview with Marcia Martin: *How to talk so your clients will truly hear you.* This is one of my favorite Horseshmouth® interviews. Marcia has trained some of the top transformational leaders in the world (e.g. Tony Robbins, Jack Canfield, Robert Kiyosaki) and she shares her easy to understand and incredibly powerful communication strategies.

<https://youtu.be/wGGr2pgX36s>

Interview with Chad Littlefield: *How to Create Deep Connection and Trust with Clients.* Chad is masterful at creating connections in groups, running online meetings and building trust. He's also the creator of the cards (<https://weand.me/product/we-connect-cards/>) we've been using at the start of our sessions. Great interview – I learned a ton!

<https://www.youtube.com/watch?v=C1DLKFMx-H4>

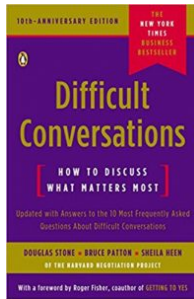
Interview with Catherine Johns: *How to build trust in video meetings.* Catherine is a former radio host, and a speaking and communications coach and consultant. In this interview she shares easy tips to make sure your trustworthiness comes across on video.

<https://www.youtube.com/watch?v=5T-tot-jasQ>

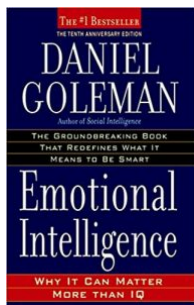
The Power of Positivity: This video may inspire you to be more of an encourager to your clients to help them succeed.

<https://www.youtube.com/watch?v=kO1kgI0p-Hw>

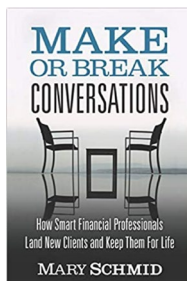
Books:



[*Difficult Conversations: How to Discuss What Matters Most*](#)
by Douglas Stone, Bruce Patton, et al



[*Emotional Intelligence: Why it Can Matter More Than IQ*](#)
by Daniel Goleman



[*Make or Break Conversations: How Smart Financial Professionals land New clients and Keep them for Life*](#)
by Mary Schmid

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Session 3: How to Set High-Octane Goals

Overview: What if everything you've learned about how to set goals in your practice was sending you down the wrong path and actually holding you back? Learn how to tweak your plan to turn your business vision into a reality.

Concepts explored: Visualization, Prosperity Mindset, Self-Beliefs

What you'll learn:

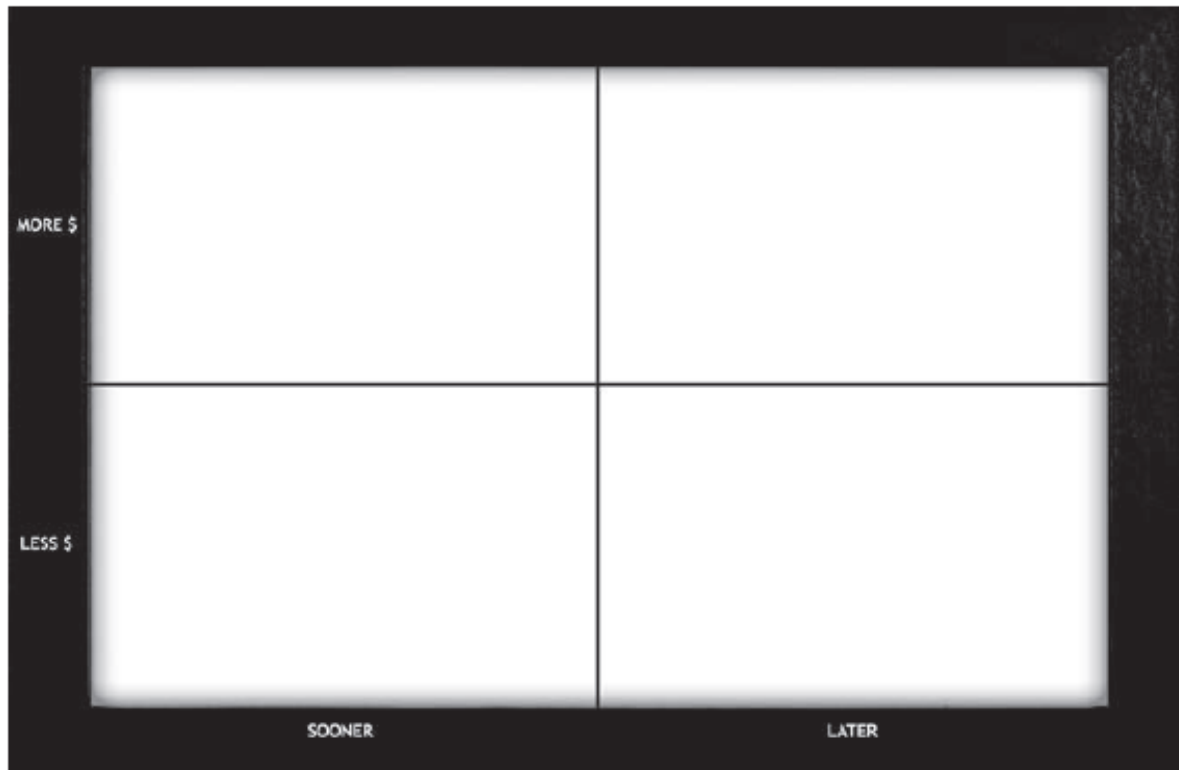
- Why most goals advisors set are destined to fail
- Getting rid of limiting self-beliefs
- A fun and easy way to create goals you can actually reach and be thrilled about
- How to keep your goals front and center to boost your likelihood of success

Tools & resources you'll get:

- Prosperity Map template
- Your individual Prosperity Picture
- Your one- and five-year goals

Activities

YOUR PROSPERITY PICTURE



BUILDING YOUR PROSPERITY MAP

YOU ARE HERE:

Where are you now? on a scale from 1-10 with 1=*far from ideal* & 10=*right where I want to be* (no 7's!):

1. Relationships:

- a. Family
- b. Friends
- c. Community
- d. Co-Workers
- e. Clients
- f. Professional Network

2. Health:
 - a. Physical Health
 - i. Eating _____
 - ii. Sleeping _____
 - iii. Exercise _____
 - b. Mental Health
 - i. Stress Level _____
 - ii. Ability to Focus _____

3. Business:
 - a. Number of Clients _____
 - b. Perfect Fit Clients _____
 - c. Revenue _____
 - d. Profitability _____
 - e. Work Environment _____
 - f. Support/Mentoring/Coaching _____
 - g. Enjoyment Level/I love what I do _____

4. Personal Development
 - a. Learn New Things _____
 - b. Grow as a Person _____
 - c. Make time for reading/podcasts/audio books _____

5. Contribution:
 - a. Financial Generosity _____
 - b. Volunteer _____
 - c. Pro-Bono Work _____
 - d. Support Others in Their Success _____

Describe what's less than excellent right now?

Professionally: business, clients, team support, etc. _____

Personally: relationships, health, home, stress, etc. _____

Describe what's going great right now?

Professionally:

Personally:

Where do you want to expand, grow, learn?

Professionally:

Personally:

YOUR PROSPERITY MAP

Step 1: WHERE do you want to go?

- What do you really, really want your life to look and feel like?
- Where do you live?
- What are you doing?
- Who is there with you?
- How are you showing up in the world?
- How do you feel?

Vision:

Describe life 3 years from now (write in present tense - e.g. I am... I live... I have... I feel...):

... and wouldn't it be cool if _____

Now pick 3 Priority Goals (write in present tense - e.g. I have... I earn ... I am ...):

1. _____

2. _____

3. _____

Step 2: WHY is this Vision important to you?

For each of your 3 goals from Step 1 - consider:

- How will this serve you personally? Emotionally? Financially? Spiritually?
- How does reaching this goal serve others?
- Who else will benefit as your vision becomes a reality?

How does each Goal serve me & others?

<u>Goal</u>	<u>Why important</u>	<u>Who Else Benefits</u>
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
<u>e.g. Run a Marathon</u>	<u>raise \$ for charity, improve health, nicer to be around</u>	<u>inspire my kids</u>

±

Step #3: HOW will I get there?

- What do I believe about reaching my goals?
- What one thing, if I did on a consistent basis, would make a significant difference in my business?
- Who are my Perfect Fit Clients? (*Note: We'll be covering attracting Perfect Fit Clients later in the program as well.*)
- How can I use generosity to drive the creation of my goals?

My How's:

e.g. work with my Perfect Fit Clients*

e.g. connect with other Extraordinary Advisors

Step #4: Who will help get me there?

- Who knows what I don't that can help get me to my goal?
- What one thing, if I did on a consistent basis, would make a significant difference in my business?

My Who's to get me to my goals more quickly:

e.g. Jill the COI

e.g. Hire a fabulous assistant

Visualizing Picture-Perfect Client Meetings

Your Meeting	Interconnectedness How will the meeting flow? What will the energy be like? What is your purpose for the meeting? What is your ideal next step after the meeting?
Your Client(s)	Impact What do you most want your client to know, feel, experience?
You	Intention How do you want to show up during the meeting? What will your energy be like? Your communication?

Notes:

Gain Traction Through Action

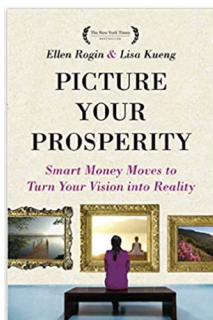
- **Practice:**
 - Continue to incorporate meditation into your day.
 - Say “cancel/clear” when you catch yourself thinking a limiting thought or saying a negative statement.
 - Visualize Picture Perfect Client Meetings.
 - Add images to your Prosperity Picture.
 - Hang your Prosperity Picture where you can see it daily and load an image of it on your phone.
 - Review your Prosperity Map. Do you want to add to it? Are there other action steps you are inspired to include?
- **Journal:**
 - Consider using one of these prompts:
 - Wouldn't it be cool if
 - What is my purpose
 - How can I best serve others today
- **Notice:**
 - When you are saying or thinking negative/judgmental statements about:
 - Your ability to reach your goals
 - Your abilities as an advisor/leader/spouse or partner
 - The economy
 - Your business
 - Others
- **Connection:**
 - Extraordinary Advisors I'm inspired to connect with:

 - Clients I'm inspired to reach out to:

- Business Contacts I'm inspired to reach out to:
- Personal Contacts I'm inspired to reach out to:
- Other things I'm inspired to take action on:

Resources for more learning

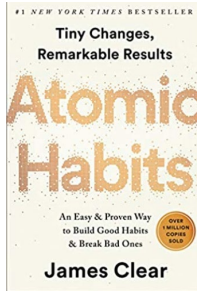
Books:



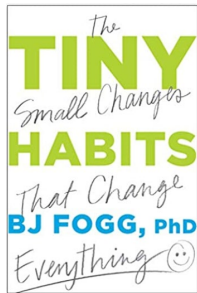
[*Picture Your Prosperity: Smart Money Moves to Turn Your Vision into Reality*](#)
by Ellen Rogin and Lisa Kueng



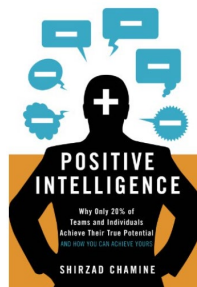
[*Self Journal*](#) by Best Self



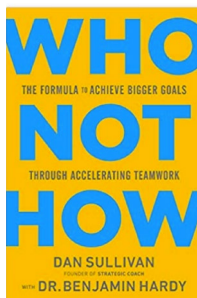
[Atomic Habits: An Easy and Proven Way to Build Good Habits and Break Bad Ones](#)
by James Clear



[Tiny Habits: The Small Changes that Change Everything](#)
by BJ Fogg, Ph.D.



[Positive Intelligence: Why Only 20% of Teams and Individuals Achieve Their True Potential and How You Can Achieve Yours](#)
by Shirzad Chamine



[Who Not How: The Formula to Accelerating Goals Through Accelerating Teamwork](#)
by Dan Sullivan and Benjamin Hardy

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Session 4: Attracting Your Ideal Clients

Overview: Do you cringe when certain clients call? What if you never again had to work with a difficult person again? Imagine having your perfect clients find you!

Concepts explored: Authenticity, Emotional Intelligence

What you'll learn:

- How to identify your ideal client
- Actions to take to attract this ideal client to your practice
- Ways to boost your referrals without directly asking for them

Tools & resources you'll get:

- Your Perfect Fit Client Attraction Plan

Activities

My Perfect Fit Clients Attraction Plan

(These exercises are inspired and adapted by activities in Attracting Perfect Customers by Stacey Hall and Janet Brogniez)

#1. My Perfect Fit Client is:

List all of their qualities, characteristics, and traits:

"When you are on a journey to fulfill your personal legend, the whole universe conspires to help you achieve it."

~ The Alchemist

e.g. one who wants me to work only from 9am–5:30pm Monday–Thursday

#2. What my Perfect Fit Client values and appreciates (*inspired by the work of Chris West*):
What my perfect fit client will say about me and the value I add for them:

_____ made a difference for me by _____
(your name)

What would I love people to say about the impact I made for them this year?

The number of Perfect Fit Clients I'll service in the next 12 months is _____

What do they value and appreciate?

Accomplishment	Dependability	Imagination
Resourcefulness	Accuracy	Dreaming
Independence	Security	Affluence
Education	Integrity	Self-control
Ambition	Energy	Intuition
Selflessness	Attentiveness	Enjoyment
Investing	Self-reliance	Availability
Experience	Joy	Simplicity
Balance	Expertise	Knowledge
Spirituality	Calmness	Faith
Learning	Stability	Career
Family	Leaving a legacy	Success
Certainty	Financial independence	Style
Support	Challenge	Friendship
Optimism	Teamwork	Charity
Freedom	Organization	Thankfulness
Comfort	Frugality	Perfection
Thrift	Community	Fun
Power	Wealth	Confidence
Generosity	Practicality	Winning
Consistency	Growth	Preparedness
Contentment	Happiness	Prestige
Control	Harmony	Privacy
Creativity	Health	Prosperity
Credibility	Honesty	Recognition
Decisiveness	Hopefulness	Relationship
Love	Discipline	Gratitude
Logic	Humor	Passion
Perseverance	Reputation	Wisdom
Flexibility	Reliability	Kindness
Making a difference		

#3. I envision my Perfect Fit Clients expect me to:

- e.g.
- *return phone calls within 24 hours*
 - *treat them with respect and kindness*
 - *have a profitable business*

#4. What do I need to enhance (*in myself, my work*) to attract my Perfect Fit Clients? (*use items from #3 that you're currently not doing*)

e.g. – *review my Perfect Fit Client list daily*

Questions to ask your existing Perfect Fit Clients (*from Steve Napolitan*)

- What is the greatest value you gained from working with me?
- What does having that do for you?
- If you can remember, what was your biggest challenge when you first met me?
- How did this affect you?
- What's one thing I could add or improve to make this an even better experience?
- What's your greatest challenge now?

Notes:

Gain Traction Through Action

- **Practice:**
 - Review Your Perfect Fit Client List daily.
 - Review #4 from Your Perfect Fit Client List and commit to take action on at least one item.
 - Spend time with your Prosperity Picture.
 - Continue to incorporate meditation into your day.
 - Saying “cancel/clear” when you catch yourself thinking a limiting thought or saying a negative statement.
 - Visualizing Picture Perfect Client Meetings.
- **Journal:**
 - Consider using one of these prompts:
 - Why perfect fit clients are drawn to me
 - How am I meant to serve today
 - Wouldn't it be cool if
- **Notice:**
 - When people share with you how you've positively impacted their life
 - How do you feel when you interact with your clients
 - Are they a perfect fit?
- **Connection:**
 - Extraordinary Advisors I'm inspired to connect with:

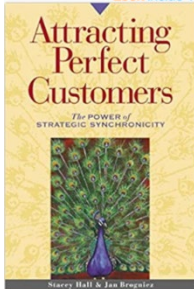
 - Clients I'm inspired to reach out to:

 - Business Contacts I'm inspired to reach out to:

 - Personal Contacts I'm inspired to reach out to:
- **Other things I'm inspired to do:**

Resources for more learning

Books:



Attracting Perfect Clients: The Power of Strategic Synchronicity
by Stacy Hall and Jan Brogniez



Capture Clients, Close Deals: A Simple Way to Gain Clients without Convincing or Chasing

By Steve Napolitan

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Video:

Attracting Your Ideal Clients in 3 Simple Steps – with Laura Gisborne

<https://www.youtube.com/watch?v=M6aiSbpldlU>

Articles:

What is an Empathy Map and How to Create One

<https://blog.hubspot.com/service/empathy-map>

Empathy Map template: <https://miro.com/templates/empathy-map/>

Session 5: Your Superpower – Finding Your Unique Edge

Overview: Clients are no longer compelled to work with advisors who are physically close now that video conferencing has become so mainstream. This means it's more important than before to stand out from your competitors. If you've ever felt it was a challenge to differentiate yourself from the competition... identifying your Superpower will change everything. And now is time to do this.

Concepts explored: Superpowers, Imposter Syndrome, Big Word

What you'll learn:

- How to identify a Superpower that sets you apart from the rest
- How to focus your team to find their Superpowers
- How to use your Superpower to grow your practice
- How to fight off Imposter Syndrome

Tools & resources you'll get:

- Find Your Superpower Worksheet
- Your Big Word to use as the foundation for your client messaging
- Your Prosperity Triangle (maps out your three biggest strengths and how to use them)

Activities

Superpower 5-Question Inventory

We often are unable to see our Superpower as it comes so easily to us. It is helpful to get input from people in our lives.

Below are 5 questions to start this process. Think of at least 5 people you can ask to help you with this. Think of people in different parts of your life such as: people on your team at work, clients, family members, close friends, mentors, or your coach. You may want to give them a heads-up that you'll be sending them an email asking them to answer 5 questions for you.

When you receive the responses you can use the worksheet to summarize their answers.

Then:

- Look for patterns, common themes or words.
- Notice how you feel when you read their responses.
- Did you know this about yourself already? Where any of these answers a surprise?
- Are they pointing you in the direction of clarifying your Superpower?

The 5 Questions:

1. What are 3 words you would use to describe me?
2. What do you think I'm really good at that's not typical, or is rare to find?
3. After we've had a great conversation how do you feel?
4. In what ways have I made a positive difference in your life?
5. If you were telling someone else about me, what would you say is "one-of-a-kind" about me?

Superpower 5-Question Inventory Worksheet

Circle Key Words

Name	What are 3 words you would use to describe me?	What do you think I'm really good at that's not typical, or is rare to find?	After we've had a great conversation how do you feel?	In what ways have I made a positive difference in your life?	If you were telling someone else about me, what would you say is "one-of-a-kind" about me?
	[cut and paste answers here]				

Notes:

Gain Traction Through Action

- **Practice:**
 - Continue to incorporate meditation into your routine.
 - Send the 5-questions for identifying your superpower to at least 5 people in your life. Consider: clients, team members, friends, mentors and family.
 - After you have received their comments look for common themes.
 - Try out saying “My Superpower is _____” and see how it feels. Notice the response you receive within and with others.
- **Journal:**
 - Consider using one of these prompts
 - What is my Superpower
 - How am I to uniquely serve today
- **Notice:**
 - Listen carefully for common phrases you hear after meetings
 - How it feels to hear what others say about what’s unique and special about you
 - How it feels to share your Superpower with others
- **Connection:**
 - Extraordinary Advisors I’m inspired to connect with:

 - Clients I’m inspired to reach out to:

 - Business Contacts I’m inspired to reach out to:

 - Personal Contacts I’m inspired to reach out to:

 -
- **Other things I’m inspired to do:**

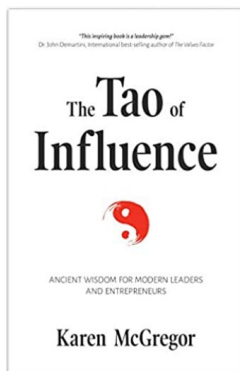
Resources for more learning

Video:

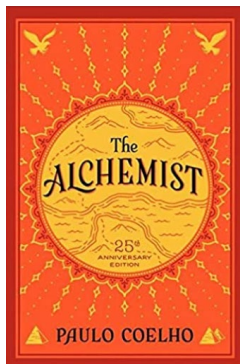
The Power of Facial Expression and Body Pose - This short video explains how body positioning and facial expressions can impact your energy and thoughts.

<https://www.youtube.com/watch?v=kO1kgl0p-Hw>

Books:



[*The Tao of Influence: Ancient Wisdom for Modern Leaders and Entrepreneurs*](#)
by Karen McGregor



[*The Alchemist: A Fable About Following Your Dreams*](#)
by Paulo Coelho

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Articles:

The World Needs Your Superpower

by [Ellen Rogin, CPA, CFP®](#)

Now, more than ever, people need your special powers. There is something that very few others do as well as you. You are uniquely gifted in an area that makes a big difference for others. Sometimes we are blind to our greatest gifts because they come so naturally. Whether you have your own business or work for someone else – you have something special that no one else has to contribute.

Why is identifying your Superpower important?



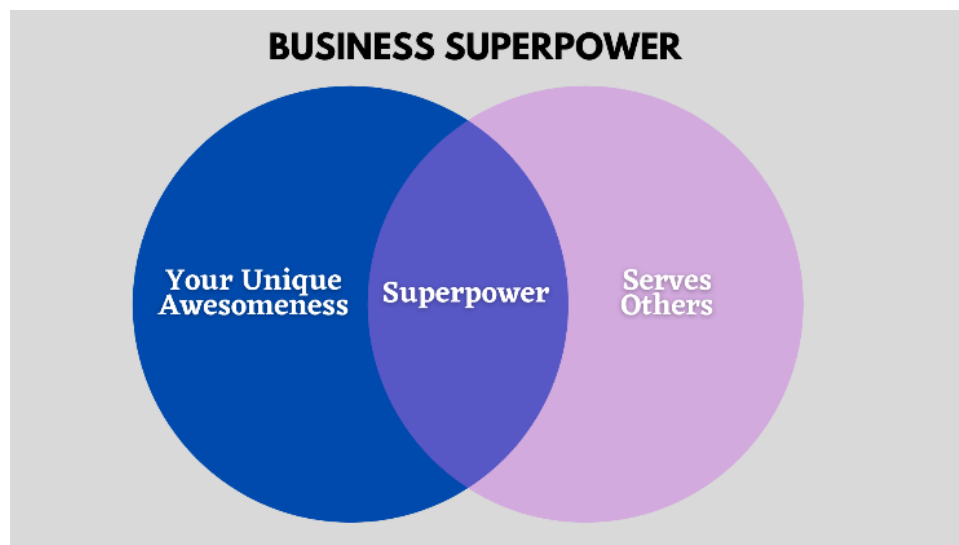
One of Ellen's social distancing Garage greetings

Being able to articulate what you are uniquely awesome at will help you to sell more effectively, promote yourself more clearly and serve others more deeply.

Here's an example. Pre-social distancing I had coffee with my long-time friend Bess Gallanis. We hadn't connected in some time and as she was filling me in on her work she said, "My Superpower is 'getting smart fast.' I'm in corporate communications and generally face some kind of a learning curve at the beginning of each new project. I may be knowledgeable about the industry, but not the topic. Or, it could be the reverse. I'm knowledgeable about a topic, and new to the industry."

We all need to get smart fast on lots of things now (uhhmm Zoom, mask making, working from home just to name a few areas.) Imagine Bess going into a sales situation and telling her prospect that her Superpower is *getting smart fast*. Right away this addresses any potential concerns about bringing in someone from the outside to help with corporate communications who doesn't know their business. It infers she'll be efficient in getting work done for them. And, it also communicates she's bright and experienced without her having to say any of these things directly.

Your Superpower is at the intersection of your unique awesomeness and being of service to others.



Superpower is all about being a force for good. If you're great at something, but it doesn't serve others it's a gift not a Superpower. And if you serve others the way lots of other people do - that's great, but it doesn't rise to a Superpower.

How do you identify your Superpower?



Start by asking and listening. Ask your clients, friends, family, and co-workers questions like:

- What do you think I'm really good at, that's rare to find?
- If you were to tell someone else about me, what would you say is one-of-a-kind about me?
- After we have a really great conversation, how do you feel?

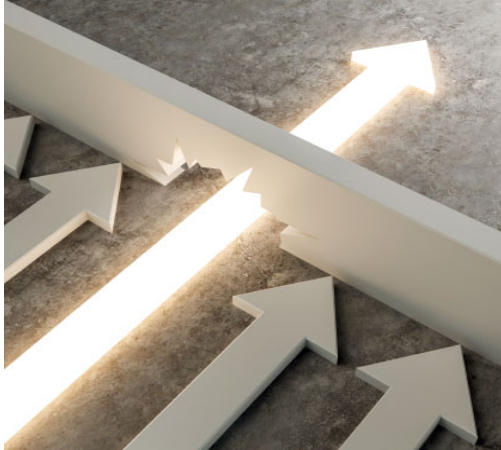
Listen carefully when you get compliments and when people tell you what they appreciate about you. Is there something you hear over and over when people meet with you? I clarified my Superpower (making people feel more calm about their money) when I heard over and over from people "I feel so much better" after we talked about their finances. I heard this not just once, but over and over.

I'm excited for you to do your best work in the world. Being clear on your Superpower is a great step along the way.

4 Pillars of Influence: How to Move Past Obstacles and Reach Your Goals

By Karen McGregor with Ellen Rogin, CFP®, CPA

Why do people get stuck on certain problems? They may have the tools to work on it, yet they give up. How can we experience a challenge but not be overcome by it? How can we do what needs to be done without creating a huge amount of stress?



International speaker and trainer [Karen McGregor](#) has recently released her third book, [The Tao of Influence: Ancient Wisdom for Modern Leaders and Entrepreneurs](#). As the founder of the Speaker Success Formula, McGregor has trained thousands of people all over the world with powerful speaking skills.

In a recent interview with Horsesmouth® contributor Ellen Rogin, McGregor discussed the topic of how to be more influential—which could mean everything from persuading clients to follow your advice to having a bigger impact in your community and the world. To reach such goals, McGregor finds that advisors need more than just skills. Her new book explores how to break down the internal obstacles that may stand in the way of success and broader influence. You can read her remarks below, or watch the video of the Facebook Live interview at the end of the article.

Skills are not enough

When I work with speakers, and that includes advisors who are doing speaking events, if they are [not reaching the goals they've set](#), there's usually something getting in the way, and they haven't reached that level of expanded influence that they want. And I did not address that "something" for many years.

I would teach people everything they needed to know, but then they either wouldn't use it or wouldn't do what they needed to do when they needed to do it—procrastinating. There was a lot of drama around the movement towards where they wanted to go. That was partly why I wrote [The Tao of Influence](#).

How can we experience a challenge but not be overcome by it? How can we do what needs to be done without creating a huge amount of stress?

So many people are under so much duress at this moment in our history. Advisors may have clients who are experiencing multiple stressors, people who have been affected by the fires, who are experiencing illness and much more that is going on. We have to acknowledge both what's happening in our outer world, and also what's happening in our inner world. Because these are unprecedented times. For most of us, we've never been in so much uncertainty.

So, it is important, I believe, to become the person that influences other people, like your clients. As financial advisors, you know that money is probably one of the most sensitive subjects on the planet. So you need to become that person on the inside who is able to then take what you've become and influence people for the better on the outside. That is really what I think is the ultimate goal.

Overcoming negative power patterns

In my book I lay out four pillars of influence that help us reach this goal. And then there are eight “power patterns,” as I call them. That's where we choose to distort the natural, positive, loving power that we have. Instead of having an open heart, being calm and happy and fulfilled, we distort and we take on one of the eight power patterns.

For example, if you have a strong tendency to control, it's probably because, as a child, you did not feel safe. You perhaps had people around you that did things that were not predictable. The environment was maybe not as secure as you would have liked it as a child.

And so, you made up your mind, as a young child, that you were going to create your own reality. Of course for an advisor, an entrepreneur, visualizing and [bringing to reality the kind of business and life you want](#) is a wonderful thing. But if as a child you're creating your own reality as a resistance to what is happening, then you can create that power pattern of control. So that's just one example, and there are many others.

But if we don't become aware of and work through these distorted patterns, what ends up happening is that when we are stressed by something that we've never experienced before, like a pandemic, all of our old, maladaptive power patterns creep in. Some of us back away and say, “I don't want to be part of this world. I'm just going to be in my little corner, do my little thing, and that's it.” And others of us launch into victimhood. That could be just with our family, for instance, if we find ourselves complaining to them every day.

It's important that we watch ourselves because [as influencers](#), everything matters—everything that comes out of our mouth, everything that we think, all the ways in which we are every day. I always say that we spend far too much time thinking, “What am I

going to do with my life?” and not enough time thinking, [“Who am I being while I’m doing all this stuff?”](#)

Ancient wisdom for modern lives

In my book I consider the philosophy and the principles of the [Tao Te Ching](#), which is a 4,000-year-old wisdom text. It’s considered by scholars one of the wisest books ever written. It’s very short, 81 verses, so you can read it quickly. But like poetry, it’s dense. So I’ve taken the principles and created step by step ways to begin to dismantle those distorted power patterns, so that we can show up fully.

Most of us, by the way—unless you’re the Dalai Lama—have some distorted power, and that can show up in many ways. Other distorted power patterns are blame, being the judge, and being the special one. That’s where you’re removed from everyone and somehow have that specialness. We can see that in different work environments as well. Whatever it is that you have as your power pattern, once you read it in my book, you’ll say, “OK. Yes. I see that.”

As an example, some of us have a need to be right. The need to be right is very much prevalent in a controller, but it can also be very prevalent in a victim. I also talk about 10 ego needs. Once you learn the eight power patterns, you need to ask, “OK. How do we dismantle the mind’s power patterns?” Because we all have them, some to a greater degree than others. But the more that we work on that, and practice that, the more that we’re able to take a situation like the pandemic and actually live through it with grace, confidence, joy, happiness and peace.

Some people say, [“That’s impossible.”](#) But you can look at people who have mastered their mind. I’m not talking about mindset, as much as I’m talking about really mastering our thoughts to see life for what it is, then being able to release it. And there are different ways in which to do that.

The first pillar: Power

The first pillar of influence is the most important, because the other three wouldn’t be fully developed without it. And it is the pillar of power—how we navigate power in our lives, with our clients, with colleagues, with our family. And it all starts, of course, when we’re very young and when we try to get our needs met.

When we’re extremely young, we’re just full of love, we’re full of joy, we’re full of exuberance. We just want to get our needs met and we get them met in pretty simple ways. But as we get older, [those needs become more complex](#).

And then suddenly, we decide in our heads that people don’t want to help us get our needs met. We start to think, “OK, if this person or these people are not going to help me feel good or not help me have my needs met, then I’m going to choose to have those needs met in other ways.” This is where all of our power patterns originate from.

The second pillar: Presence

Being able to go from the first pillar to the second, which is presence, is huge. If you really want to be present, and you're finding yourself stressed, and it feels like you just aren't with the people that are in your house or your community, they can feel that. It's very difficult to help and support people and create change on the planet if we ourselves cannot be present to them or to anyone else.

That's why I encourage you to get your power patterns figured out first, and understand the nature of the mind, using your understanding in practical ways, then moving into presence.

People say, "Well, I'm only present when I meditate." That's not very helpful to the rest of the world. So, it's important to get those power patterns, but also get into an environment in which it's easier to be present.

How to create calm in your home seems to be a popular topic right now. If you want to be present, just look around you, look around your environment. Is this an environment that you believe is easy to be present in? Why are we making it so hard on ourselves? There need to be certain boundaries, certain things put away; perhaps certain things come out like music, salt lamps, prayer beads, whatever it is that you find creates that inner calm.

But without the mind, without learning those power patterns, we can create all the calm we want in our environment, but it isn't going to change anything [because the inner environment is chaotic](#).

A lot of people think influence is an extraction, that we're trying to change something by extracting it. But real influence is actually who we are inside. So the greatest thing you can do is create your inner calm, because that will impact everyone around you.

It's amazing to see, even people who are quite hyper or quite chaotic, when they have someone around them who reminds them of the calm, their brains start to synchronize—not fully, but at least partly. And it's this very interesting impact that we can all have when [we ourselves are calm](#).

We can take all the productivity training in the world, but the greatest productivity training is really handling those power patterns to allow us to be present. When we're gripped with fear of the future or concern about the past—which is almost always for most people—we can't be in the present, even when we think we are.

The mind will often grab onto something like, "This is such a comfortable chair." And then you'll immediately start thinking about other times when you had a comfortable chair, or maybe an uncomfortable chair. "Oh gosh, my butt was so sore that time!"

I'm making fun, but that's how the mind works. We are constantly making associations with everyone and everything. You need to learn to dismantle that and be fully present. It is difficult to make a quick-fix solution for presence because there are steps involved in order to get there. You can't just say, "Well, why don't you just be more present with your family?" That will last about three minutes.

The third pillar: Purpose

The third pillar is purpose. I want to clarify that when I say "influencer," I mean someone who [creates real change for others](#), for the planet, and for their community, both in what they do and by who they are.

A lot of people say, "With all the things that are going on in the world, do I really know what my purpose is?" In my book I talk about how to get really clear on your purpose in the world and the actions to take, the goals that you want to set. However, I also talk a lot about the higher-level purpose, which is our purpose to love.

A dishwasher at a restaurant has more of a chance of being an influencer and impacting the people around them, if they do it with love and joy and laughter, than a CEO who's acting like an ass. If everybody's afraid of him or her or doesn't even want to be part of the company, it's likely because of the hang-ups and the power patterns that this person has.

Influence is not a title. It comes from the greater purpose, that we are here to love each other and here to love the planet. And if we forget that, then our titles, our identities, become so important because we think that is what makes us who we are.

I remember reading a long time ago a story about Mother Teresa, bless her heart. She had a very influential, wealthy businessman come to her and he was really struck by who she was and what she was doing in the world.

He said, "I just want you to tell me, how can I create a great big global impact? I want to do something big." And she said, "Do you know your neighbor?" He said, "Well, what do you mean?" She repeated, "Well, do you know your neighbor? Let's start there."

It always brings tears to my eyes because we forget how these beautiful, small, daily pieces of love can affect so many people. Part of us wants a deeper purpose to do, to act, to create an impact, and I'm all about that with my systems and structures that I teach people. But without the deeper understanding that love always must lead, we get into big trouble.

Helping others with their purpose

One thing that, [as leaders, we need to do more often is help others with their purpose](#). Sometimes we can see something in someone, and it's just so obvious that they might be in the completely wrong job, or they might be in the right job, but maybe not reaching their potential because they haven't found something inside of them. And so

often, we let that slip. We don't really support people to see the greatest version of themselves.

When I interviewed Mathew Knowles, Beyoncé's father, he said, "Karen, I'm never afraid to fire someone when I know that it's clear that what they're doing in my company, the role, is not their purpose." I thought to myself, "What a different and beautiful way of looking at our roles at work."

If someone is not happy in a position, if it's not their purpose, if they're doing it for the money, maybe they're afraid about just surviving or whatever, we really have to have a conversation with them. Is this really what you want, and if not, where might you be better suited? And what can we do about it?

Maybe you don't fire them, but say, "Let's try and find this person a different role." If they need to be let go, you help them to discover their next step. We have to take care of each other. Because this is a time where people deeply need to feel a sense of purpose.

The fourth pillar: Potential

Number four is potential. When you have the other three—you've worked on your power patterns, worked on being present, supported others and yourself to tap into those deeper levels of purpose—then we can go to what I call a different level of mastery, [a different level of potential](#). We move from the 'me' to the 'we.' We move to things like starting or creating or being part of a big movement.

As a financial advisor, for example, you could master it so well that you take it to a completely different level, and people are really inspired by you. Maybe there are young, up-and-coming financial advisors who want and need what you have to offer.

Potential is divine. People say to me, "I don't want to be perfect. Perfection is not for me." And I always say, "What if you could take fear out of the word perfection?" Because perfection, without fear about being good enough, is actually a very divine thing, to be as good as we possibly can be in one area.

Not for our ego, not to attain, not to extract from the earth or different people, but at a level of coming in touch with our divinity, so to speak. People cry when they see a beautiful piece of art, like Michelangelo's *David*. Why? Because it is as close as you can get to perfection. People respond to that because we are built that way. Never be afraid to aim really high and to do good things on the planet.

[Here's](#) an interview with Karen talking about the 4 Pillars.
<https://youtu.be/1wbSgSEDZ3k>

Session 6: Doing Work that Matters

Overview: What if you could make an even bigger difference in the lives of your clients and their families? Imagine if your work consistently felt like a calling and not a job? This can happen. You can create a business that changes the world. Sounds big? Yes. And, you have the power to do this!

Concepts explored: Gratitude, Generosity

What you'll learn:

- How to build your business based upon generosity
- How to create a “corporate halo” around your work
- Strategies to get your team as committed to your business as you are

Tools & resources you'll get:

- The Generosity Focused Marketing Plan
- Your Money/Business Manifesto

Activities

Value Matrix:

	Clients	Team	You
Impact	What impact do you wish to make on your clients? What results would you like to see for them?	What impact do you wish to make on your team? What results would you like to see for them?	What impact does being an EA have on you? How does this reflect what you value?
Results	What types of clients are you working with?	How does your team feel about working with you? How does it serve them?	What results are you seeing in your life? Financial? Time? Satisfaction?
Structure/ Systems	What processes are in place to serve your clients?	What systems are in place for your team to do their best work?	What systems are in place to ensure you are doing your best work?

Your Value Matrix:

	Clients	Team	You
Impact			
Results			
Structure/ Systems			

Example:

	Clients	Team	You
Impact	Meeting their goals Happy	Making their lives better	Doing my best work in the world
Results	Perfect fit	Happy Committed Doing their best work	Money Time Flow & Ease
Structure/ Systems	Follow-up Process Deliverables	Workflow Meetings Reviews	Calm Control Doing what I'm great at

My Generosity Plan

Suggestions:

Number of notes of encouragement/gratitude I will write each _____ (day, week, month) is _____

Volunteer hours I will give per _____ (week, month, year) is _____

Number of referrals I will give per _____ (week, month, year) is _____

Charitable donations I will make in the next 12 months: _____

Percentage of my income I'll allocate toward giving/donations: _____%

Other acts of generosity:

- Mentoring
- Kind acts to team members
- Deep listening to friends/co-workers/clients/family
- Before reacting ask "What is the most generous response I can give?" (from [The Generosity Path by Mark V. Ewert](#))

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Notes:

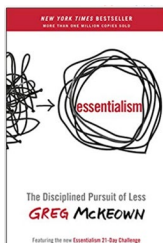
Gain Traction Through Action:

- **Practice:**
 - Continue to incorporate meditation into your routine.
 - Craft your Business Manifesto:
 - Meet with your team/coach to brainstorm.
 - See journal prompts below.
 - Set daily giving goals.
 - Wear and practice using your Abundance Activist® wristband.
- **Journal:**
 - Consider using one of these prompts to get clear on your Business Manifesto:
 - What drives me crazy about how people handle their money (rant)
 - What I hate about my industry (rant)
 - People don't know how they are messing up their money when they (rant)
 - Turn the rants around ...
 - What I know is important
 - What I believe must be done
 - How I know I need to show up
 - How I know our team needs to show up
 - What I believe is (or, what I believe to be true is)
 - Consider using some of these prompts to grow your business generosity quotient:
 - How can I be of service today
 - What do my clients need from me today
 - What does my team need from me today
 - What does my family need from me today
 - What value am I to add
- **Notice:**
 - How does your generosity show up for you?
 - Financially?
 - In listening?

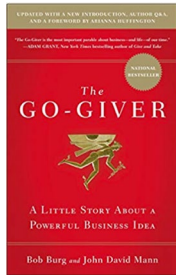
- With team members?
 - With strangers?
- Are you more generous:
 - When you are less busy?
 - When someone asks?
 - When you offer?
 - With money?
 - With time?
 - With people you know?
 - With strangers?
- **Connection:**
 - Extraordinary Advisors I'm inspired to connect with:
 - Clients I'm inspired to reach out to:
 - Business Contacts I'm inspired to reach out to:
 - Personal Contacts I'm inspired to reach out to:
- **Other things I'm inspired to do:**

Resources for more learning

Books:



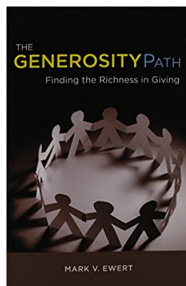
[Essentialism: The Disciplined Pursuit of Less](#)
by Greg McKeown



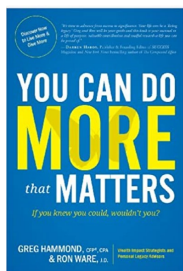
[The Go-Giver – Expanded Edition: A Little Story About a Powerful Business Idea](#)
by Bob Burg and John David Mann



[Give and Take: Why Helping Others Drives Our Success](#)
by Adam Grant



[The Generosity Path: Find the Richness in Giving](#)
by Mark Ewert



[You Can Do More that Matters: If you Knew You Could, Wouldn't You?](#)
by Greg Hammond and Ron Ware

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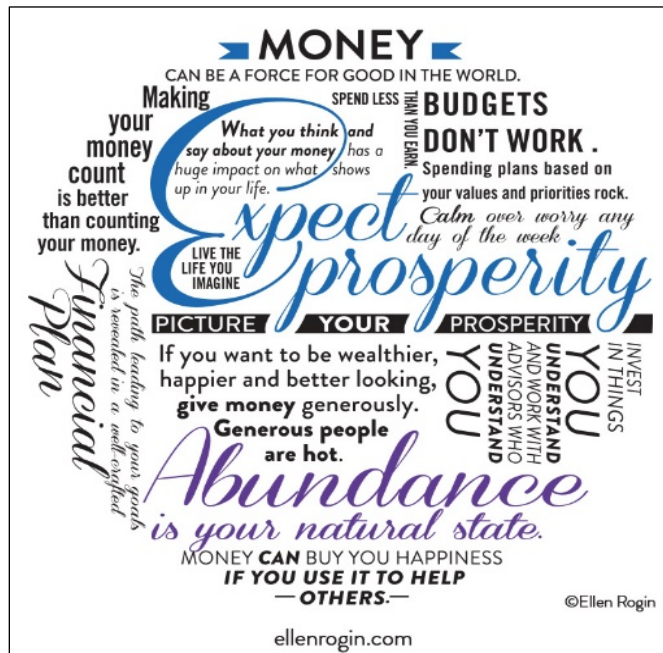
Video:



[Interview with Alice Tang on Building a Strong Network](https://youtu.be/i6JAYLFkumA)

<https://youtu.be/i6JAYLFkumA>

Ellen's:



Lululemon Manifesto:



Tom Peters – [*This I Believe!*](#) Link to his manifesto of 60 things he believes.

Jonathan Adler Manifesto:

OUR MANIFESTO

WE BELIEVE that your home should make you happy.

WE BELIEVE that when it comes to decorating, the wife is Always right. Unless the husband is gay.

WE BELIEVE in carbohydrates and to hell with the puffy consequences.

WE BELIEVE minimalism is a bummer.

WE BELIEVE handcrafted tchotchkes are life-enhancing.

WE BELIEVE tassels are the earrings of the home.

WE BELIEVE in our muses: David Hicks, Alexander Girard, Bonnie Cashin, Hans Coper, Gio Ponti, Andy Warhol, Leroy Neiman, Yves Saint Laurent, and Madonna.

WE BELIEVE in the innate chicness of red with brown.

WE BELIEVE in being underdressed or overdressed always.

WE BELIEVE in infantile, happy emblems like butterflies and hearts.

WE BELIEVE celebrities should pay full price.

WE BELIEVE in rustic modernism: Big Sur, A-Frame beach houses, raw beams, and geodesic dome homes.

WE BELIEVE in Palm Beach style: Louis chairs, chinoiserie, Lilly Pulitzer, The Breakers circa '72.

WE BELIEVE our designs are award winning even though they've never actually won any.

WE BELIEVE in Aid to Artisans.

WE BELIEVE dogs should be allowed in stores and restaurants.

WE BELIEVE in mantiques - suits of armour, worn Chesterfield sofas, heraldic tapestries.

WE BELIEVE you should throw out your Blackberry and go pick some actual blackberries.

WE BELIEVE colors can't clash.

WE BELIEVE in blowing your nest egg on our pots.

WE BELIEVE our lamps will make you look younger and thinner.

WE BELIEVE in irreverent luxury.

Other thoughts on how to write your business manifesto:

<https://www.enchantingmarketing.com/business-manifesto/>

<https://www.valuablecontent.co.uk/blog/how-to-write-a-business-manifesto>

Resources for more learning

Manifesto graphic design:

Have a graphics person do designs to be used on your website, in emails, social media etc. Add a copyright and your website address to some.

Without these if you are going to create a wall hanging for your office.

- [Fiverr.com](https://www.fiverr.com) – search for “word art” under graphic design
- [Upwork.com](https://www.upwork.com) – create a job post asking for a graphic designer who can create “word art, wall art – consisting of text and a very small amount of graphics”

Manifesto collateral:

- **Stickers** – [Moo.com](https://www.moo.com)
- **Note cards** – If you go to sites like [Zazzle.com](https://www.zazzle.com) or [vistaprint.com](https://www.vistaprint.com) you can easily have note cards made with your manifesto printed on them.
- **Canvas Prints** – There are a lot of sites – here are a couple to look at
 - <https://www.canvaschamp.com/>
 - <https://www.easycanvasprints.com/>
 - <https://www.vistaprint.com/> If you get on their mailing list they send coupons constantly (annoying but could save you some \$\$)

Articles:

A 5-Minute Interaction That Boosted My Business

By Ellen Rogin, CPA, CFP

Originally published on Horsesmouth.com

During my time in the industry, I've realized that sometimes as advisors, we become too focused on the numbers. It's common to believe that if you just focus on your financial goals, your business will grow. And similarly, if you just pay your employees well, they'll do well. But I believe that this thinking is flawed, and I've made big changes as a result.

Quick Overview

What's working now: Spending more time focusing on how one's financial advisory business benefits others and how this focus can increase performance and job satisfaction.

In one study, Wharton management professor Adam Grant and his fellow researchers arranged for the call center employees to interact with a scholarship recipient. Not for long, just about five minutes. This brief chat made a big difference. Over the next month the researchers tracked the amount of time on the phone and the donations brought in. They found that those employees who interacted with the student spent twice as much time on the phone and brought in a lot more money: a weekly average of \$503.22 up from \$185.94. When asked why their results improved, the callers didn't attribute their success to the interaction. So this wasn't a conscious change in their behavior. This research experiment was done in a variety of businesses and found similar results.

5 minutes to motivation

Research from Wharton management professor Adam Grant influences my thinking. Grant's research revealed that when employees see how their work affects others and has meaning, they not only enjoy their work more, but actually perform better.

In a recent study, he looked at paid employees at a call center making fundraising calls for a public university. Clearly not an easy job—calling potential donors at dinnertime,

facing constant rejection, and not getting paid much for doing so. How do you motivate them to keep dialing? It turns out that it's pretty easy—introduce them to someone who benefits from the donation.

It's not about the pay

I also read research quoted in the *Harvard Business Review* which found that merely paying people more did not increase employee engagement and job satisfaction. The research finds that there is a weak link between salary and job satisfaction and this holds true for highly paid as well as less compensated employees. What does work? They say, “Quite simply, you're more likely to like your job if you focus on the work itself, and less likely to enjoy it if you're focused on money.”

Inspired impact

I now believe that spending more time focusing on how your work benefits others can increase your performance and job satisfaction. I think that clarifying what I call your “inspired impact” — how your work truly serves your clients — can be one of the most effective business-building strategies.

I ended up making a change when I began thinking about this issue. I shifted my perspective from focusing on the traditional ways of setting my business goals (AUM, gross revenues, profit, number of new clients) to how my work makes a difference in the lives of my clients. I was able to increase my business by 39% in a down market. Seriously, this perspective shift was **the** key factor.

A big part of my strategy was to encourage as many “5-minute” interactions between clients and myself and my team as possible.

Here are some things we did:

- **Put the focus on the clients' lives.** In our office, we spend time each week at our team meetings talking about the personal lives of our clients—who changed jobs, who moved, who lost someone close to them, and so on. We talk about what those clients need from us.
- **Clarified my Superpower.** I believe that each of us has something we do better than most other advisors. This is our business Superpower, and it tells you how you can most highly serve your clients. Mine is calming people down. When people come into my office stressed about money or financial decisions, by the time they leave my office they are noticeably calmer. I consistently hear from people “I feel so much better” after we've spent time together.

When I've spoken to groups of financial advisors and ask them to share their Superpowers, I hear things like:

- "I'm an encourager — I make people excited about what they are doing."
- "I make people laugh."
- "I am the person people want to go through difficult times with — I can be in the trenches with them and they will come out the other side stronger and better."

I think that it's vital to ask, "What is your Superpower?" And if you're not sure, you should ask your team, your clients, and your friends. I think you should encourage your team to share their Superpowers, too.

- **Set up my office for client interaction.** The way our office is designed allows our team to have the opportunity to greet our clients as they walk back to my office. It also gives our wonderful, appreciative clients the opportunity to share their gratitude with our team.
- **Simply asked more clients to share.** I've come to believe in the power of asking clients how they've benefited from working with us and inviting them to share their answers with the team. Clients feel great about it and the team does, too.
- **Created opportunities for feedback.** For the 25th anniversary of my business, I sent a letter to my clients offering to make a \$100 contribution to a charity of their choice in their honor. What I didn't anticipate was how many of them would share with me the difference our work has made in their lives. This milestone in my business has prompted them to look back at our relationship and what has changed in the time we've worked together. I made sure to share these kind words with our team to make sure they realize how their efforts are helping our clients. I think that client appreciation events are also a wonderful time to emphasize to the team how their work positively impacts the lives of the people they work with.

A shift in attention

We are a helping profession. We change our clients' lives for the better each and every day. We are also in a numbers-based, money-focused profession. I've learned that while, of course, it's important to know what's going on with the numbers in our business, all too often this is where all of our business planning attention goes. By spending more time planning on how we will make a positive difference in the lives of our clients, we'll likely boost our results as well as our happiness. Shifting the focus toward service with the team will do the same for them as well.

25 Ways to Grow Your Business With Generosity

By Ellen Rogin, CPA, CFP®

Originally published on Horsesmouth.com

People want to do business with those who are genuine and gracious with their time, knowledge, and expertise. Here are some ways to start making generosity a habit and build the good will of those in your orbit.



If you've been in business for a while, you've likely used and mastered the traditional ways to grow your practice. Maybe you started out by making cold calls, going to networking meetings, hosting seminars, and schmoozing with centers of influence — all tried and true strategies.

But if you haven't upgraded your approach in a while, I suspect you've seen your results suffer. Truth is, it's not that networking doesn't work anymore, rather, the way you go about networking needs updating. The same is true for working with COI's and offering workshops; time for a refresh!

Generosity is the new currency in business.

Maybe it was always the currency, but no longer will people tolerate referring business to an advisor who is, as Adam Grant, author of [*Give and Take*](#) calls it, "a taker," or even "a matcher."

Clients, referral sources, and staff want to do business with authentically good people who are doing good things in the world, and who are generous with their advice, their network and their resources.

25 ways to boost your generosity:

Need some inspiration to boost the velocity of your generosity? Remix your strategy with these 25 ways to grow your business based on generosity.

1. If you want more referrals, give more referrals

What goes around comes around, and not always from the same individual. Be the person people go to when they are looking for a referral. Go beyond the traditional attorney, CPA and mortgage broker referrals. How about including massage therapists, decorators, nutritionists, counselors, coaches, and personal trainers? You get the idea.

2. Mentor another advisor

If you want to really grow your skills, and your business, help someone else grow theirs. Mentoring isn't "giving back," a term I personally don't like. It's about "giving forward." [You can be a mentor](#) at any stage in your career. Maybe you rock at using video and webinars to attract prospects and a more experienced advisor has no clue about this. You can mentor them on these strategies. And maybe you need help in dealing with staff issues and someone with more years in the business can help you.

3. Take a colleague (notice I didn't say competitor) out for coffee

There is plenty of business to go around. Making friends with other advisors in your area just may bring more referrals your way. Every client isn't a good fit. When you can refer to an advisor who might be a better fit, everyone wins. You may have the perfect skill set for a prospect that an advisor in your network can't serve.

4. Start a study group

Find other advisors you like and respect and [create a study group](#). This can be virtual or in person. You'll be able to share best practices, marketing ideas, and be there to support each other when business gets complicated.

5. Step up to be a leader in a professional organization

Supporting organizations that you participate in is a great way to meet other professionals and show them what type of professional you are. When you do an excellent job as a volunteer in a professional organization, not only are you helping the group, but also evidencing your skills. This is a good way to create a professional glow and be top of mind for referrals.

6. Send thank you notes...every day

When you sincerely thank someone for how they've helped, inspired, and supported you, you'll make the recipient feel like a million bucks. [Handwriting the note](#) will set you apart and make a big impression. If you just won't do that, email is still a great way to acknowledge someone important to you. Actually, pull out your phone right now and

send a text thanking someone you know for their awesomeness. Guaranteed to make you both feel great.

7. Be a generous listener

Are you truly [giving your full attention](#) when clients, team members and your family talk to you? Or, are you like most people and while other people are talking you're thinking about what you're going to say next, making a judgement about them, or something totally unrelated like what's for dinner?! Giving another person your undivided attention is a beautifully generous act.

8. Make a charitable donation

Loosening your grip on money will allow more to flow your way. Having a discipline around your charitable giving will help you to be more deliberate about how you support causes you believe in. One of the best strategies I know is to set up a separate account earmarked for giving. Take a percentage of your income each month or quarter; put it into a separate account. Yes, it can be a donor-advised fund, but it can also just be a separate money market or saving account. Once I started doing this my business grew. Do I know why? Not really, but [studies have shown](#) that people who give more make more.

9. Introduce 2 people who can help each other

This isn't about inserting yourself into an introduction — it's about making connections for your connections. This will eventually come back to help you. Be patient and trust.

10. Volunteer

This is obvious, but crucial. Spending time volunteering has [so many benefits](#) including helping you grow your business. And while it's not the reason to volunteer, you just might meet people who can refer to you. Being a valuable member of your community will help put a corporate halo around your firm. This is not only helpful for bringing in business, but almost required these days for recruiting new team members. Some 64% of millennials take corporate social responsibility into account when deciding where to work.

11. Donate to your client's favorite charities

When my practice had its 25-year anniversary, we sent letters to our clients offering to donate \$100 to their favorite charity. They loved this and we did too. Not only did I celebrate this milestone in a positive way, but I also learned about my clients' favorite causes. Terrific information to have to acknowledge them going forward.

12. Write LinkedIn testimonials

I know, as an advisor, you might not be able to receive testimonials on LinkedIn, but you can likely give them. Support people in our network without being asked. This can

include COI's, friends, speakers you hear at conferences (believe me this is greatly appreciated) and people you personally do business with.

13. Give some social media love

Go ahead and give them a dopamine hit. When you like, comment, or share a post you're supporting someone in your social network to get their messages out to more people. This will help them and give them a jolt of feel good chemicals in their brain as well.

14. Share your favorite podcasts and blogs

We are all overloaded with information. When you can curate great sources of information for clients and peers, they will be so grateful to you. *Shameless plug alert:* You can start by recommending Horsemouth and [Horsemouth AdvisorRADIO!](#)

15. Write a heartfelt gratitude note

Think back about who has been so inspirational and influential in your growth and success. Take out a note card and write to them about the impact they've made on your life. Share a specific memory with them. Seal the note, and mail it.

16. Don't be shy about your volunteerism



Hopefully you are involved with charities to support a good cause (rather than to impress your clients or friends). But you don't have to be silent about your good work. Remember, people want to do business with good people. You can be subtle about this. Perhaps putting a picture up in your office that spurs a conversation, or mentioning your work as you are catching up with clients. This picture of our daughter, Amy, on our first [volunteer trip](#) to Ghana was in my office for a long time.

17. Contribute your time and talents during Money Smart Week

In our local area there are lots of events going on for [Money Smart Week](#). In the past I've done pro-bono consultations with people in Chicago. Not only did I feel like I helped people out, but also connected with other advisors in my area.

18. Donate business clothes to a charity that will pass them on to people in need

[Here are some ideas where to donate](#), and [here are some more](#).

19. Memorialize a time of connection with a photo postcard

Send a client, colleague or friend a photo postcard that captures a significant time with them. Here are some examples of “[ink cards](#)” I’ve sent:

When I connected with dear friends and women I’ve mentored at a conference:



Source: Ellen Rogin

When a friend of mine spoke at a big meeting and rocked the stage:



Source: Ellen Rogin

20. Send an ‘I’m thinking of you’ email to a client

Don’t ask for anything. Don’t make it about business. Just let them know they are important to you and you’re thinking about them. Maybe send them a wonderful quote or a funny joke (just be confident they will think it’s funny, too.)

21. Throw a great event for your clients

Show clients how grateful you are by throwing a party in their honor. This isn’t a market update; it’s fun, entertaining or interesting. A wine tasting, a talk from a local celebrity, or maybe an evening with a magician. You know your clients. What do you think they would really love?

22. Give generosity-focused party favors at your client events

Perhaps [cookies](#) from a bakery that supports developmentally disabled adults, [candles](#) made by refugees, [fair trade gifts](#) or gifts made by [Global Mamas](#), which bring a fair wage to women in Ghana. Please stop giving mugs with your company logo on them—nobody wants these.

23. Meditate regularly

There are many studies on how [meditation](#) reduces reactivity, stress, and increases the ability to take another's perspective. What could be more generous to your clients, team, and family than you being calm, a better listener, and less reactive?

24. Do pro-bono consultations or teach a course

Could your knowledge be helpful for people in your community or for a local nonprofit? Local organizations such as women's shelters, YMCAs, local high schools, etc. would love your knowledge. You can also find opportunities through [The Foundation for Financial Planning](#).

25. Surprise your team with a special day out or a special day in

Let your team know how important they are to you on a regular basis. I've done spa days (always a fan favorite), and also brought massage therapists into the office. Pick something they'll just love and they'll likely love you and their job. And that shows! Not only will your team be appreciative, but your clients will notice something positive in the air as well.

Here are more ideas of ways to be [ridiculously generous](#) in all areas of your life. And when you are, watch what happens to your business growth! Remember, generosity is the new currency in business.

Session 7: How to Boost Your Business Intuition

Overview: Do you ever get a gut feeling that you should be doing something (or not) in your business? Maybe you're thinking about a client, so you call them and hear, "Oh! I was just about to call *you!*" Do you trust these internal nudges and follow them? Learn how to follow your own good intentions to create new opportunities, build relationships, and avoid missteps.

Concepts explored: Focus, Mindfulness, Intuition, Insights

What you'll learn:

- The difference between intuition and the chatter in your head
- How to enhance and trust your gut instincts
- Ways to practice building your inner wisdom to help you communicate more effectively

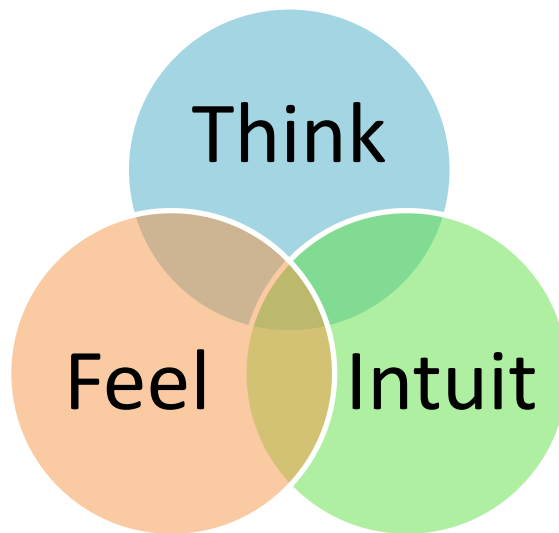
Tools & resources you'll get:

- Short daily practices to boost your intuition
- Guided meditation for amplifying your business intuition

Activities

Definition of intuition (source Merriam-Webster)

- 1: a: the power or faculty of attaining to direct knowledge or cognition without evident rational thought and inference
b: immediate apprehension or cognition
c: knowledge or conviction gained by intuition
- 2: quick and ready insight



What percentage of your business energy/attention falls in each of these areas?

Thinking Percentage of energy/attention _____

Feeling Percentage of energy/attention _____

Intuiting Percentage of energy/attention _____

The Extraordinary Advisor Journey

	Calmness	Clarity	Communication	Compensation
Before				
Now				
Aspiration				

Reflection:

Think back to when we started the Extraordinary Advisor Masterclass. Reflect upon where you were then, where you are now and where you would like to be in the future. You can complete this chart with symbols, words, drawings, etc. which reflect your assessment.

Notes:

Gain Traction Through Action:

- **Practice:**
 - Continue to incorporate meditation into your routine.
 - Spend time in nature.
 - Exercise.
 - Ask for signs and then pay attention to what you notice.
 - When a client, contact, or friend pops into your mind, reach out to them.
 - When your phone rings play with guessing who's calling before you look at the caller ID.
 - Take a different route driving to or from a place you go often. Tap into your *inner GPS* to decide which way to go.
- **Journal:**
 - Consider using one of these prompts:
 - Who I should be in touch with today is
 - How can I best serve in my meeting with (name of who you are meeting with)
 - What should I be aware of today
 - Keep a "coincidence/synchronicity" journal
- **Notice:**
 - When you trust your gut and when you doubt/question it
 - When you keep seeing the same numbers (or other things such as birds, feathers, etc.) over and over
 - When you are thinking of someone and they reach out to you
 - When you reach out to someone and they say "Oh, I was just thinking I needed to call you!"
- **Connection:**
 - Extraordinary Advisors I'm inspired to connect with:

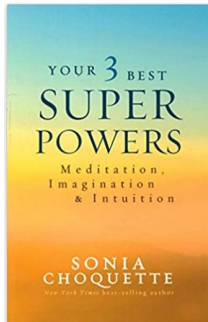
- Clients I'm inspired to reach out to:
- Business Contacts I'm inspired to reach out to:
- Personal Contacts I'm inspired to reach out to:
- Other things I'm inspired to do:

Resources for more learning

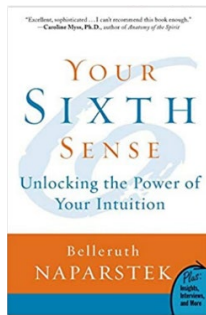
The Heartmath Experience – Learn from an inspiring experiential program that offers new insights and practical techniques to help you respond to day-to-day challenges with more ease and composure. At the time the workbook was created the course was free.

<https://www.heartmath.org/training/heartmath-experience/>

Books:



[*Your 3 Best Super Powers: Meditation, Imagination & Intuition*](#)
by Sonia Choquette



Your Sixth Sense: Unlocking the Power of Your Intuition
by Belleruth Naparstek

#ad

For more information on Ellen Rogin's programs visit:
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