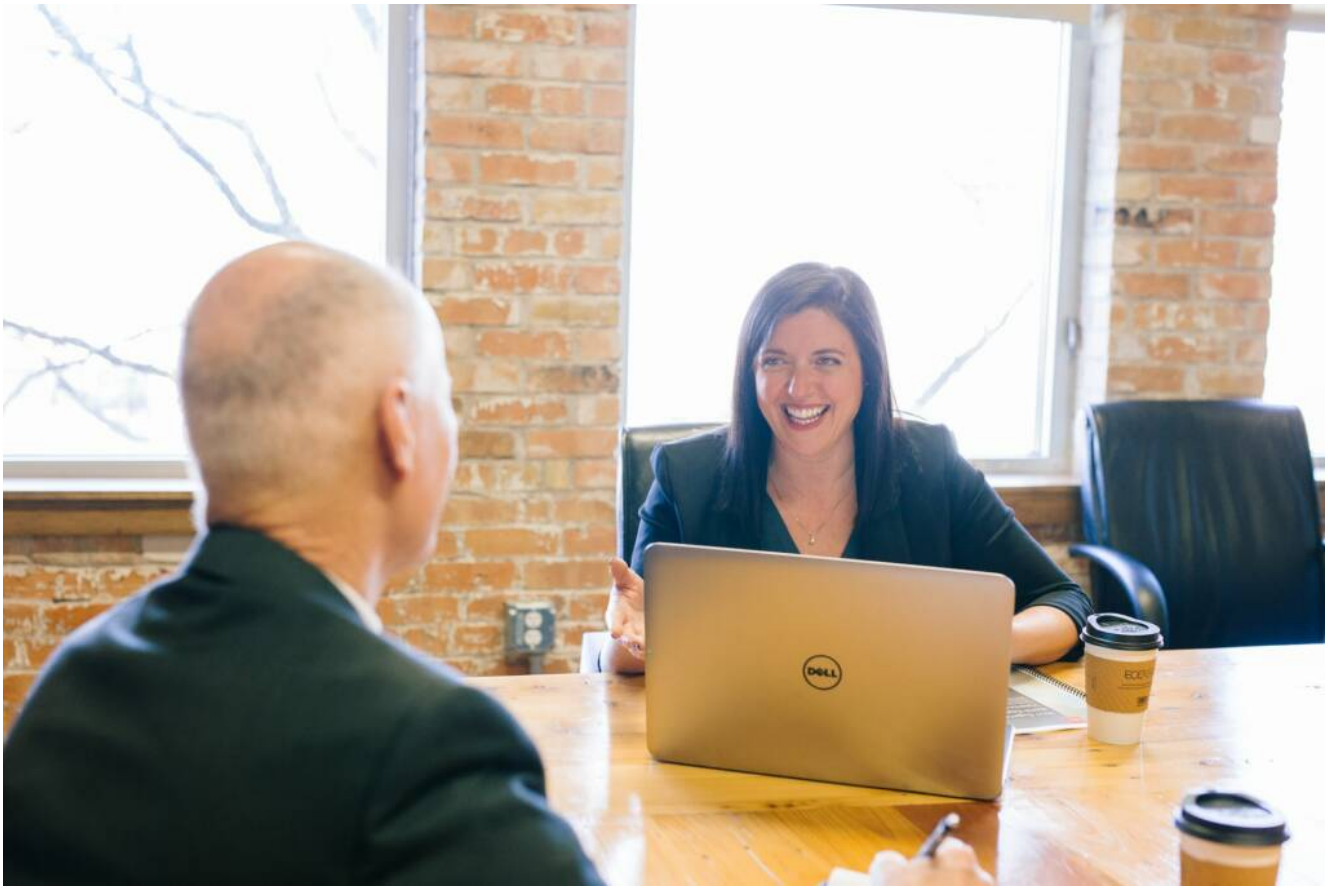
Could You Benefit from a Personal Board of Directors?



CEOs at large organizations usually have a network of close advisors, c-suite executives, and stakeholders who hold them accountable for achieving important tasks.

In her book Building Career Equity, expert consultant Jan Torrisi-Mokwa proposes that we all do the same. This idea could be especially beneficial if you don't have the kind of built-in accountability that a top corporate job provides. Creating your own "board of directors" can help you reevaluate your relationship with your work, clarify your goals, make more meaningful strides in your personal and professional development, and improve your decision-making.

Here are six people you should consider offering seats on your board.

1. Mentors

An established, experienced professional in your field can be an invaluable resource. Think about someone you know who has had the kind of career that you're envisioning when you look out on your trajectory. That pro could share lessons they learned, mistakes they want you to avoid, and feedback on your next big idea.

2. Coaches

Business coaches can provide some of the same insights a mentor does, but often with a higher level of systemization and accountability. There might be room for both a mentor and a coach on your board. But if you're the kind of person who commits more to things you schedule and pay for, you might appreciate the extra level of structure that you'll get from a coaching relationship.

3. Teachers

Talking to academics can give you a unique perspective on trends that are reshaping your business, as well as related fields and the broader economy. But with the wealth of online classes and continuing education programs that have sprung up for adults, you could also take classes outside your comfort zone that will expand how you think about your career, or develop new skills that will help you pivot to something new. Perhaps a deep dive into the history of where you live will help you rethink your company's connection to its community. Brush up on your French skills and your career prospects might expand across the pond.

4. Networkers

Do you know someone who seems to know everyone? If not, you might want to explore professional organizations that can broaden your connections. You could start with your local Chamber of Commerce or Rotary Club. Groups like YPO (for CEOs

of larger companies) and EO (entrepreneurs and small business owners) organize their members into forums where they can talk shop with other professionals. And getting more active on social networks like LinkedIn could help you deepen connections that you already have and identify potential board members.

5. Family and Friends

The people who know you the best are the best equipped to know when you're struggling, when you need extra support, and when it's time to celebrate. If you tend to keep business and family separate, consider sharing more of your long-term plans with your spouse, siblings, parents, or a close friend. While the other people on this list will probably focus on your professional progress, loved ones can help you stay true to yourself and find the balance you need to excel in both business and life. And on those days when your goals feel too far away from that comfy spot on your couch, a loved one will be there to get you on your feet.

6. Financial Advisor

OK, we may be a little biased on this one. But we're also very confident that our planning process can help you take in the big picture, establish goals, track your progress, course-correct when necessary, and get the best life possible with the money you have.

And whenever your life and your money are at a crossroads, we want to be on your speed dial.

This article was prepared for Aaron Larson's use.

Finding Purpose in the Everyday



What is your money’s purpose in your life?

That’s maybe the most important question that our planning process helps people to answer. If the purpose of life was just to make more money, then no one would ever stop working. The best uses of our time and our money lead us to more meaningful experiences that help us to grow as individuals, connect to our loved ones, and make a positive impact on the world around us.

If the hustle and bustle of life and work have come between you and your sense of purpose, try this three-step process to get back in touch with what matters the most.

1. Reflect on your purpose.

Perhaps the biggest obstacle between ourselves and our sense

of purpose is finding time to reflect. Schedule a block of time to simply sit, relax, and think about where you are in your life right now. You might try meditating, journaling, or even light exercise as a way to tune out the rest of the world and clear your head.

So much of our identity is wrapped up in what we do for a living that it’s important to think beyond how we earn money. Think about the people who are most important to you and how you work on those relationships. Think about the interests you had when you were younger, the courses you took, and how those things led you toward your career or away from another line of work. Envision a week when you didn’t have to work at all and think about how you would spend your time.

After working through these questions, you might find that you’re already more connected to your life’s purpose than you realized. Or you might identify potential changes that you want to spend more time thinking about, such as building more self-care into your weekly routine, taking online classes to learn a new skill, or even contemplating a new career.

2. Focus on the little things.

Very few people get to spend every second of their day doing exactly what they love to do. The trick to getting through the inevitable struggle is to cherish those moments when you put your talents to their most meaningful uses.

For example, the pandemic era has been particularly stressful for medical professionals. Doctors and nurses have had to contend with challenging work conditions, grumpy patients, staff shortages, and delivering the worst imaginable news. But they’ve also deepened their bonds with coworkers, exercised all their skills and knowledge, learned new things, and helped countless people through serious illnesses.

Every job has those moments of purpose that we should all spend more time focusing on. No matter what you do, there’s an

end customer whose life you're making better, a co-worker you're teaching or learning from, a problem that you're able to solve, or a family member who benefits from the fruits of your labor.

3. Take more purposeful actions.

If your workday is so full that you can't build more purpose into it, you might need to be more mindful about how you spend your time outside of work. Volunteer at a school or charitable organization. Teach or mentor the next generation of professionals in your field. Wake up an hour earlier so that you can devote some extra time to your exercise goals or hobbies. Invest in more purposeful relationships by leaving work at work and focusing your free time on friends and family.

Or, if your current job just isn't aligned with your purpose, start working on a plan that will help you make a smooth transition into your next act.

We want your financial plan to connect your life, work, and money in a purposeful way. Call us and we can schedule a meeting to discuss how we can help you get more from your money.

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