Blueprinting Guide

Live your life by design,
not by default.

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COACHING

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The Core of Your Business

Stepping out on your own is a major milestone. As a wise advisor, you're thoughtful about what lies ahead as you embark on the next chapter of your career.

As you picture yourself running your own firm, you're thinking about what needs to be done before you start the paperwork: establishing compliance processes, branding your website, choosing a custodian and converting your clients.

We can help you transition from advisor to advisor owner with our best-in-class technology, back-office support and comprehensive marketing strategies, so you can concentrate on helping clients and landing prospects. But just as important are the principles that guide your professional life.

Don't overlook the core of your business.

There's an old saying: "If you don't know where you're going, any road will get you there." Pick a road that leads to sustainable success and professional fulfillment.

In this exercise-based guide, we help you define your mission, vision, values and goals – everything that will help you develop a strong foundation as you establish your firm and amplify its growth.

Choose the right path. Unlock your potential.

Find Your Why

The Blueprinting Process is a series of exercises we created to help you live your life by design, not by default. The purpose of these exercises is to help ignite your passion and lead you to personal fulfillment. In other words, it will help you find your "why."

This series of six exercises will help you develop a crystal clear map of where you want to go personally and what you want to accomplish professionally. This new clarity will help make your life much more meaningful and your business much more profitable.

Completing the Blueprinting exercises is the key to igniting your passion. Igniting your passion requires you to dig deep. You have to spend some serious time reflecting, contemplating and being authentic with yourself.

This is not something you're going to knock out in a weekend. It could take weeks, or even months, before it fully evolves into a clear picture of your future.

Values

All people have certain principles and values they believe in and live by. These are the innermost beliefs that distinguish who we are and how we conduct ourselves. Values are things that are very important to us. They include family, health, career and spirituality. Having strong convictions about what we value and keeping them front and center in our lives keeps us balanced and focused on the most important things. In the long run, focusing on what you value, coupled with solid principles, will help you live a fulfilling life that is far more satisfying than any short-term gain from compromising.

Having these strong convictions benefits you in other ways, too. In times of indecision, you can turn to your guiding values. They will frequently give you the framework for making tough decisions. When you're unhappy, you can turn to your values and see if you're leading a life that is consistent with your beliefs. When you're underachieving, you can turn to your values and gain the motivation to make the extra effort.

The key is to feel so strongly about your values you are motivated to take action and live by them.

Identify What You Value Most

Decision Making

Have you ever had trouble making a decision? In business and in life, we have to make decisions all the time. Many of them involve “gray” areas where more than one solution will work. Indecisiveness results when you are not clear on your values. Once you bring clarity to your values, making decisions becomes easy.

Happiness

Far too many people go through life without zest and enthusiasm. Frequently, this is because they are doing things that are not congruent with who they are. The result can be burnout, depression and ineffectiveness. The key is to reflect and uncover what is important to you and then make sure your life is in sync with that.

Achievement

Some of the greatest fulfillment in life has come from people who felt so strongly about their values, they were willing to devote their lives and, in some cases, sacrifice their lives to live them. The key is to feel so strongly about your values you are motivated to take action. Having conviction about something you value, and then committing to living by it every single day, will go a long way toward igniting your passion.

Identifying What You Value Most

In this exercise, you'll identify what you value most in life and then rank them from most important to least important. Examples that might appear on your list include:

Family – Health – Spiritual Fulfillment – Love – Relationships – Generosity – Adventure – Achievement – Passion – Creativity – Leaving a Legacy – Fun/Happiness – Positive Attitude – Learning – Helping Others – Simplicity – Financial Security – Peace of Mind – Respect – Gratitude – Abundance – Compassion – Faith – Growth – Honesty – Integrity – Kindness – Selflessness – Significance – Vitality – Wisdom – Intimacy – Security

Directions:

List at least six things you value most in life and then rank them in order of importance. Then, indicate the percentage of time you spend living and supporting these values.

Things I value most in life are:

Value	Rank	% of Time

(List continues on next page)

Things I value most in life are (cont):

Value	Rank	% of Time

Take a close look at your list. Are you spending a lot of time living and supporting your values?

Remember:

Values are not some fluffy ideal. They need to be fundamental to who you are as a human being. With that said, some of your values may change over time due to changing circumstances in your life. What's important to you today may not be as important to you five years from now. Consequently, it's important to review your values on a regular basis to make sure they are still important to you.

To get more focused on your values, **restate your top six values in the chart below**, then list one key action you can implement that will help you more fully integrate that value into your life. For example, let's say health is one of your top six values.

Here's how that line on the chart might look:

Value	Action to integrate it more fully into my life
Health	Exercise at least 30 minutes a day, five days a week.

Now complete the full chart:

Value	Action to integrate it more fully into my life

(List continues on next page)

Value	Action to integrate it more fully into my life

You'll refer to this chart a little later as you work on developing your goals. To keep your values top of mind, review this list on a regular basis, especially when you are feeling frustrated, resigned or cynical.

Purpose

We all have certain desires and pursuits in life, such as ensuring our security and caring for loved ones. But, when we move beyond the day-to-day pursuits of life, what moves you?

Without meaningful purpose, we simply go through the motions. We respond to the alarm clock, we go to work, we solve the day's problems, we eat, we relax, we spend a few minutes with the family, we go to bed and then we wake up and do it all over again. We could do that for 50 years and then look back on what we've accomplished and be sadly disappointed at how much time we spent accomplishing so little. Each of us is capable of making a very positive impact in the life we live.

For many people, being a loving spouse and raising great kids is a huge accomplishment, and they should be rightfully proud of that. Meaningful purpose goes a step beyond and transcends what we do for ourselves and our immediate family. Meaningful purpose reaches out to the world around us and infuses life with the special gifts each of us have inside.

Find Your Meaningful Purpose

The following exercise is designed to help you identify, unlock and pursue your meaningful purpose so the world can benefit from your unique gifts. Below are a series of questions, and your objective is to reflect on them, write your response and then consciously decide how you will move forward living your life with meaningful purpose.

What causes you to jump out of bed in the morning feeling refreshed and ready to tackle the day's challenges?

What are your unique gifts, i.e., what do you do extremely well?

What activities are you most passionate about? What gives you a great feeling of satisfaction and fulfillment?

What causes will you fight for?

Given a choice, do you prefer to help people by rolling up your sleeves and pitching in, or do you prefer a behind-the-scenes role? Give examples of the types of activities you like to do based on your response.

How will you know you are living your life with meaningful purpose?

If you live your life with meaningful purpose, how will the world be a better place?

Based on your answers to the previous questions, take some time now to jot down your thoughts on what your purpose in life may be. Granted, this is a tall order, but you have to start somewhere. Make some notes, then set it aside for a while and let it sink in. Revisit what you wrote and see if it still feels congruent. Continue this process until you come to the “aha” moment and you know you’ve got it!

Meaningful Purpose Notes:

Vision

Going back to that old saying, “If you don’t know where you’re going, any road will get you there.” That’s a recipe for mediocrity. People of great achievement know exactly where they’re going, and they take the necessary steps to get there. Where is “there” for you?

“There” is your ideal future scenario. This is the dream life and business you would create if you had absolutely no constraints and could simply wave a magic wand and make it happen. It’s your vision for your environmental surroundings, the people you associate with, what you spend your time doing and what you want to accomplish. It’s different for everybody. For example, perhaps you want to be successfully self-employed, working from home and living in the mountains. Or, perhaps you want to work for a non-profit organization that speaks to your heart and live near your children and grandchildren. It can be anything, but it must be something, and it must be clearly defined. It must include tangibles so you can see it, feel it, touch it, smell it and hear it so you can get all your senses involved in helping you drive toward it.

Your vision must be compelling. It must be something that motivates you to jump out of bed in the morning and get working. Your vision is what will sustain you when you face major obstacles. To develop it, disengage from the present and position yourself in a future with unlimited possibilities. Eliminate your limiting beliefs and think big. With this frame of mind, you can develop a vision that propels you to success and happiness far beyond what you’ve ever imagined.

Create a Compelling Vision of Your Future

The key to your compelling vision is to create one that motivates you to take action and helps you persevere even when times are difficult. Here's an example of a compelling vision of the future:

I enthusiastically jump out of bed every morning full of love for God, family, friends and life. I am a husband my wife is proud of, a father my children look up to and a friend people count on.

My family is financially secure, physically fit and emotionally close. We live in a comfortable home on one acre with a postcard-perfect view of the Pacific Ocean. Our home is light and airy with crisp ocean breezes blowing through. Pictures of my family and special moments in our life line the walls. The sound of grandchildren fills the house. As I look out the window, I see waves lapping the shore, seals playing on the rocks and surfers hanging ten.

My days are spent helping the people around me reach their fullest potential. I do this by meeting with my top clients, guiding them in reaching their dreams and aspirations, and communicating my wisdom through my life-planning website. My financial success enables me to be a reverse tither, and I give away 90% of my income and live on 10%. My schedule is flexible and I spend several hours a week mentoring disadvantaged children. For recreation, my wife and I travel the world, visit our kids and grandkids, read and take time to enjoy the beauty of the great outdoors.

When I go to bed at night, I sleep soundly knowing I helped make the world a little better than it was when I woke up.

In this exercise, you'll paint a picture of your compelling vision.

Directions:

Don't hold back. Finish each statement as accurately and completely as possible. This is your future, so make it a great one!

(CONTINUED ON NEXT PAGE)

I want people to remember me by saying I was…

If I had all the money I ever needed, I would spend the rest of my life…

If I wasn’t so afraid, I would…

Review how you finished all the previous statements. From this, use the following outline to write a compelling vision that motivates you to take action and gives you great excitement from just thinking about it.

Relationships I surround myself with…

Environment I live and work in…

I spend my days working on…

Away from the office, I…

I'll be remembered for…

Create a Vision Statement

Now that you have a compelling vision for your future, it's time to simplify this information to share with your team by creating a professional vision statement. A professional vision statement answers the question, "Where do I see my business in the near future?"

In the space provided below, create a professional vision statement that is succinct, motivational and provides clarity for your team about where you are going.

Professional Vision Statement:

Mission

A mission statement is not simply a hokey statement that gets written once and then filed away. Rather, it is a living, breathing document that should be displayed prominently for visual reinforcement and should be internalized to keep your subconscious working on it. Spend time developing it, memorizing it, living it, and you'll be pleasantly surprised at the results.

Develop a Personal and Professional Mission Statement

Personal Mission Statement

Here's an example of a personal mission statement:

"My mission is to be loving and loyal to my family and friends, lead a successful career that I enjoy, stay healthy and take on any challenges that come my way.

I value my family, friends, spiritual fulfillment, sense of accomplishment and enthusiasm. I value my relationship with God and live by the Golden Rule.

Throughout my life, I will always be supportive and loyal to my family and friends. I will be an active member in my place of worship and in my local community. I will use my financial management skills to help needy organizations keep their financial houses in order.

I will live life to the fullest and strongly believe that nothing is impossible."

Ensure your statement is personal, meaningful and inspirational. There's no set length to a mission statement. Just make sure you can remember it and it connects with you.

A personal mission statement is your declaration of the kind of person you want to be. It will serve as your lighthouse during difficult times and keep you motivated, focused and true during your life. Share it with your spouse or significant other. Think of it as a daily guide to living. Answer the following questions to help you create your personal mission statement.

(CONTINUED ON NEXT PAGE)

Who do I want to be?

How do I conduct myself?

What and who is important to me?

Directions:

Review your answers to the previous questions and then take some time to write a draft of your personal mission statement. The key is to get something down on paper. Let it percolate and then come back to it. Eventually, solidify and review it each day.

Personal Mission Statement:

Professional Mission Statement

Your professional mission statement is your business guide. It can address such issues as who you are, why you exist, who you serve and what results your clients can expect. After you develop it, share it with your team and your clients. Let it permeate your office and guide you and your team.

Here are several examples of professional mission statements submitted by financial advisors:

To create a world of financial comfort by implementing custom solutions to individual needs!

We are dedicated to enhancing the quality of our clients' lives as we oversee their wealth to help them achieve their long-term goals and dreams.

To guide our clients through the process of obtaining financial confidence so they can focus on the most important things in life.

To guide our clients in making wise decisions based on Biblical principles for wealth management.

Similar to a personal mission statement, make it personal, meaningful and inspirational. Both statements should be reasonably short and highly memorable. Again, there is no set length to a mission statement. Just make sure you can remember it and it connects with you.

In this exercise, you'll create a professional mission statement.

A professional mission statement is your declaration of the kind of career you want to have. Answer the following questions to help you create your professional mission statement. If you are a stakeholder, and not a business owner, write it from the perspective of how you do your job.

(CONTINUED ON NEXT PAGE)

What does my business offer that my target market needs and is willing to pay for?

How do I deliver my products and services in a way that is tangible and distinguishable from the competition?

Why do we exist?

What desirable outcome can my clients expect from working with me?

Directions:

Review your answers to the previous questions and then take some time to write a draft of your professional mission statement. The key is to get something down on paper. Let it simmer and then come back to it. Eventually, solidify and review it each day. Then share with your team to internalize and memorize.

Professional Mission Statement:

Express

A value proposition defines what makes your practice unique and the experience delivered to your clients. A simple way to create a value proposition is to select keywords from your professional mission statement and define each keyword to answer why a prospect should do business with you, or what they experience when the prospect becomes a client.

Express Your Value

Create a Compelling Vision of Your Future

Sample Value Proposition from Carson Wealth:

You are here today to decide if there is a compelling reason for you to work with me and my practice. The mission statement at Carson Wealth is:

> To **inspire** our clients in making **informed decisions** through **education, communication**, and **service that exceeds their expectations**.

Our mission statement is more than just words; it's the action we take. Let me define for you what a few of the keywords in our mission statement mean to me.

Inspire: Our goal is to inspire you, our client, to live your life by design, not by default. Money is a tool to get the most out of your life.

Informed Decisions: Once you are inspired to share what you want out of life, next, we help you make informed decisions that are logical for you. Our skilled Certified Financial Planner, Certified Public Accountant, Attorney, and Insurance Specialist bring our resources together to develop a plan so you can accomplish your dreams.

Education: Making informed decisions can only be accomplished by providing you with education. You don't need to understand everything we are doing, but you do need a holistic view of what we are doing, why we are doing it and how it applies to you.

Communication: Our communication doesn't stop at education. Many firms claim to communicate frequently with clients, but we take it a step further and we over-communicate for transparency and to build trust. You will never be disappointed in the level of communication you receive from Carson Wealth.

Service that Exceeds Your Expectations: We deliver a level of service that will exceed your expectations. In our country, expectation of service has never been lower. So, we are going in a different direction. We provide a Four Seasons experience with FedEx efficiency.

How can we do all this? We are independent and sit on the same side of the table as you. We have a seamless proactive service process, which means we anticipate your needs. It means being bifocal, paying attention to what is happening today and anticipating changes on the horizon. Additionally, the entire team does their piece to add value to the process. It's not about working with Ron Carson, but about having a systematized approach so you get to "Experience the Carson Wealth Way."

Does this sound like the type of relationship you are looking for from the company managing your wealth?

Create Your Value Proposition

Now that you have a solid mission statement, you can create your value proposition. In the space below, rewrite your professional mission statement created in the previous section:

In your mission statement above, highlight three to five keywords you can use to answer the following questions:

- Who are you and what makes you different?
- What do you do for your clients?
- What will their experience be like working with you?

Write each of your keywords on the following page and then use that keyword to answer one of the questions above.

Keyword or Phrase #1:

Define:

Keyword or Phrase #2:

Define:

Keyword or Phrase #3:

Define:

Keyword or Phrase #4:

Define:

Keyword or Phrase #5:

Define:

Put it all together!

Create a story, drawing together your keywords from your mission statement, ending with a “punchline” that connects it all together.

Your Value Proposition:

Create a Tagline

A tagline allows you to easily communicate your ideal client to your clients and team members in a succinct statement. When the opportunity arises, your client or team member will be ready to answer the question, “Why should I work with your advisor?” Here are a few examples of taglines:

My advisor is the #1 Barron’s ranked advisor in North Dakota.

My advisor specializes in the unique financial needs of airline pilots.

My advisor guides women through life changes.

Directions:

Using your value proposition, build your tagline. If the examples above didn’t trigger any ideas, choose a word from each column below.

Tagline

Your Function	Ideal Client	Action	Conclusion
Help	Pre-retirees	Build	Financial security
Guide	Retirees	Transition to	Retirement
Lead	Single women	Toward	True wealth
Show	Business owners	Achieve	Financial goals
Steer	Doctors	Realize	Peace of mind
Assist	Engineers	Accomplish	A legacy
Support	Corporate executives	Protect	Ideal lifestyle
Point	Chiropractors	Develop	Custom strategies
Address	NFL players	Work toward	Maximize S.S. benefits
Enhance	Multi-generational families	Design	Charitable foundations
Manage	{Insert company name} employees	Find	Desired future
Oversee	Real estate agents	Discover	Organized financial matters

Once created, share your tagline with your clients and team members often and as part of your education about the types of clients you want to replicate.

Goals

We all have wants and desires. We all daydream about what it would be like to live our ideal life. But, merely thinking about it will not get us our ideal life. We have to be clear about what we want, when we want it and why we want it – and then take positive action to make it happen. The goal-setting process is critical to making all this happen. As we set goals, make sure they are SMAC-certified: specific, measurable, achievable and compatible.

One of the keys to goal-setting is to tie them into your compelling vision. Your compelling vision is a lifetime pursuit. To make that manageable, you have to break it into pieces. To do this, complete the goal-setting and action-planning exercises. As you set goals, start by reviewing your compelling vision and then work backward. To pursue your vision, think about what has to happen in 10 years, five years, three years and one year. Determine what age you, your spouse and your children will be at each of those time periods. Identify the goal, then determine the one activity that will have the greatest impact on reaching that goal. Also, identify the reward you will get by reaching the goal.

Set Short- and Long-Term Goals

Here are examples of categories in which you might want to set goals:

Attitude – Are there any attitudes or limiting beliefs you need to change to reach your compelling vision?

Career – What do you want to accomplish in your professional life?

Education – Do you need additional knowledge that will help you pursue your vision?

Family – How can you improve your relationships?

Financial – What net worth are you striving for? What business financial goals do you have?

Physical – What specific physical goals can you set? Do you want to be a certain weight? Do you want to exercise a certain amount? Is there a challenging physical goal you'd like to achieve such as climbing Mount Rainier?

Recreation – What do you want to do in your free time that will rejuvenate you?

Community – What do you want to do for your community? What legacy do you want to leave?

Spiritual – How do you want to grow in your spirituality?

Directions:

On the following pages, write down your goals for the next 10 years, five years, three years and the next year. Start with your 10-year goals. At a high level, what should you have accomplished to make your compelling vision for the future a reality?

Next, complete your 5-year goals and 3-year goals. What needs to happen during the short-term periods to assure the long-term goals are achieved?

Finally, complete your 1-year goals at a much more granular level. For your 1-year goals, you will include the actions needed to reach your goals as well as a reward that will drive you when your motivation is low.

Sample: 1-Year Goals

My Age:	Spouse's Age:	Kids' Ages:
57	52	29, 27, 21

Goal	Actions To Achieve	Reward
» Take a two-week family vacation in July	» Schedule on calendar » Meet with family to determine location » Book travel and hotels	» Grow closer as a family, smiling faces, new experiences
» Exercise vigorously at least five days per week to lose 30 pounds	» Join the local health club » Get up by 5:15 a.m. » Hire personal trainer for six months	» New $2,000 wardrobe

10-Year Goals

Use the following templates to build your goals.

My Age:	Spouse's Age:	Kids' Ages:

Goals	Actions to Achieve	Actions to Achieve
#1		
#2		
#3		
#4		
#5		
#6		

5-Year Goals

My Age:	Spouse's Age:	Kids' Ages:

Goals	Actions to Achieve	Actions to Achieve
#1		
#2		
#3		
#4		
#5		
#6		

3-Year Goals

My Age:	Spouse's Age:	Kids' Ages:

Goals	Actions to Achieve	Actions to Achieve
#1		
#2		
#3		
#4		
#5		
#6		

1-Year Goals

My Age:	Spouse's Age:	Kids' Ages:

Goals	Actions to Achieve	Actions to Achieve
#1		
#2		
#3		
#4		
#5		
#6		

The information included herein is for informational purposes and is intended for use by advisors only.

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