



PRIORITY
ALLOCATION



TIME
MANAGEMENT



SCALABLE
ACTION

A FINANCIAL ADVISOR'S

BURNOUT RISK

REPORT

WHAT IS BURNOUT?

Burnout is a state of physical, mental, and emotional exhaustion caused by excessive and prolonged stress. It's unfortunately common among financial advisors.

In fact, 75% of financial advisors experience high levels of burnout from work.

Advisors cite the stress of navigating markets, clients needs, growing their business, and balancing their work and personal life as primary stressors. If you're on the path to burnout, you may have noticed yourself:

- Working too many hours & feeling pressured by growing demands
- Tying your presence in the office to the profitability of the business
- Putting off life or health to meet business goals
- Feeling like you can never “turn off”
- Becoming more irritated with staff, clients, even family
- Lacking energy or inspiration
- Becoming distracted often with doomscrolling or other habits

Following you will find the three keys to beating burnout in your business.

You can find more information and resources on our website www.trueadvisor.io.





PRIORITY ALLOCATION

Are you taking on
the role of
business owner?

PRIORITY ALLOCATION

Prioritization is the key that unlocks freedom in your business.

As the likely founder of your business, you have been largely personally responsible for your success to this point. You've had the vision, creativity, and tenacity. You've done everything that was needed, taking on all sorts of roles and responsibilities along the way.

You've worked harder and, therefore, produced more than many people around you. But after some time, you notice the grind taking a toll. Your calendar is filled beyond capacity. And as you put your dreams of a great lifestyle on never-ending hold, you start to wonder what all that hard work is for.

What got you to this point is not what will get you to the next level.

It's time to sit in the seat of the business owner: clearly articulate your vision, delegate execution, inspire your team, and get your life back.

HOW TO IMPROVE YOUR PRIORITY ALLOCATION

Prioritization is a big topic. While the headings below are simply stated, their importance should not be overlooked. In the Wave Three Mastermind Community, we go over tried-and-true business structures and organizational roles, as well as strategies for hiring, training, and accountability-- in great detail with practical application.

OWN YOUR ROLE

As the business owner, your primary role is the visionary leader of your practice. Your big-picture ideas and solutions will propel your practice to new heights.

CLEARLY ARTICULATE YOUR VISION

You have production goals already. Let's take these a step further. Take some real time to think about your ideal business with you as the ideal business owner. Write out exactly where you want to go, in detail, and why.

Share this vision with your team. Knowing why you think it's possible to accomplish a big goal, or what inspires you to expect hard work from your team will inspire them too.

Your daily tasks should be laser-focused on activities that move this vision forward. Your team can easily follow a leader who has shared what he wants, why he wants it, and demonstrates commitment to the vision through his own focused work.

[Download the Producer's Planner](#) for a step-by-step guide that will take you from grand vision to daily execution.

GIVE UP CONTROL

As your business grows, you should be able to step further and further away from day-to-day tasks. Your team can be developed to accomplish much more than take tasks off your plate. Often, teams are more ready for additional responsibility than advisors give them credit for. And if they're not, we can teach you how to hire the right people for the right roles, at the right time.

FIND FREEDOM

An empowered team will leave you with time and freedom to work ON your business instead of IN your business. You'll have room to think, learn, grow, create. . . and live a little!



TRUE ADVISOR



TIME MANAGEMENT

Are you taking the
minimum necessary
action to produce
the greatest possible
result?

TIME MANAGEMENT

Proper time management is the fastest way to see tangible improvement in business performance and personal stress level.

In our productivity driven, constantly connected culture, we're all looking for ways to get more done. You may have read all the best productivity books, hoping to learn the special trick that will finally unlock unlimited time in your schedule.

But if the productivity hacks aren't working and your business is feeling stressful or chaotic, or if you never seem to have enough time, I'll let you in on *THE BIGGEST PRODUCTIVITY SECRET of all time*:

You're doing too much.

So, instead of adding more to the schedule, let's subtract. Simplicity is the surest and most efficient path to success. After you clearly articulated your vision in the last section, you can eliminate, delegate, or defer all the things you don't need to do now.

Get out a pencil and paper (or iPhone and, um, finger?), we're going to free up some of your time right now.

HOW TO IMPROVE YOUR TIME MANAGEMENT

Pull up your calendar and to-do list to reference all activities. I would also recommend jotting a quick list of all the little things you do throughout your week that are too trivial to end up on a to-do list. These may be great candidates for elimination or delegation.

EVALUATE CRITICALLY

Look at each activity and ask the following questions:

1. Does this directly impact my most important goals? If no, eliminate it.
2. Could someone else complete this task? If yes, delegate it.
3. Is this something that needs to be done now (make this decision in light of your most important goals)? If no, defer it to a later date.
4. Whatever is left is what you need to do. Schedule these tasks on your calendar. See if you have room for all of them. If not, go back through this exercise until you do. You must be ruthless here. With some critical analysis, you're going to find that some of the tasks and projects you've been spending a lot of time on aren't as important as you thought.

ROOM FOR ERROR & OVERHEAD

No one can follow any perfectly crafted schedule 100%. Leave room for error and overhead.

Leave some blank space in your days. Don't pack them completely full. Tasks often take longer than you would like, no matter how great you are at allocating your time. It's easier to add something to your day that you were planning to do tomorrow than it is to rearrange your schedule every time something doesn't go perfectly to plan.

Also, leave 30-minutes to an hour a day and/or maybe a longer block each week for miscellaneous tasks that do not directly impact your goals but you aren't able to eliminate or delegate. That call to the mortgage company, decisions on insurance coverage, calling Aunt Sue back about her cat (if you must), things like that. When these things come up, you can drop them into a ready-made "overhead" spot on your calendar and you'll never feel like you're scrambling again.

TOOLS AVAILABLE

We have so much to teach about time management! A great way to get started is to [*download our Calendar Calculator*](#) to dial your calendar in even further by calculating the exact calendar blocks you need to meet your production goals for the year.



SCALABLE ACTION

Is your business ready
to grow?

SCALABLE ACTION

There is nothing else like the energy of a scaling business.

It can be like the excitement of a successful rocket launch. . . or the terror of a slow motion, calamitous crash.

Independent financial advisory offices are typically fairly small in size and have a close-knit group of employees. Fast-paced growth can tear down that family-feel and exploit the holes in your operations to the point of stalling growth.

It's time for an overhaul if you and your staff so busy and over worked that no one feels like they are getting what they need to do a good job.

We can show you how to prepare for growth by properly structuring your team, systemizing, and holding each role accountable. You'll avoid the crash and have a culture people love coming to work for. Eventually, your team can be ready to fly solo, and you can step away as little or as much as you like, knowing things will continue to run smoothly.

With all the right pieces in place, you can ignite rapid growth while you and your team enjoy the process.

HOW TO IMPROVE YOUR SCALABLE ACTION

ORGANIZE

It's extremely common for advisors to have questions about team structure, employee roles, "org charts," order of hiring, etc. There is speculation about whether centralized or decentralized control and decision making are best. But we don't have to guess about what is best for your business. Many advisors and business owners have come before you and blazed the trail. In our Masterclass we review the business structures that have been proven to work efficiently.

They're based upon the foundational principles of responsibility and accountability. Every function in your business should have only one person upon which the final responsibility rests. Multiple people may be involved, but they all answer to one person on that function. And that person is held accountable for that responsibility.

This is a *centralization of control* over individual functions but an overall *decentralization of power*. We recommend that the founder have a right-hand person to facilitate many tasks, and leadership team(s) develop over time as the practice grows.

Specific details are discussed at length in the [Wave Three Mastermind Community](#).

MOBILIZE

Systems are the tools that your employees need to work. Systems should be extremely simple, standardized, and well documented.

The simpler the systems, the faster you can grow.

System details for each major business function are in the masterclass, but some tools we like are Slack for communication, Lucid Chart for org charts and training tools, and Notion for training documentation.

REPORT

As a business owner, you need numbers available to you at all times! A scaling business must have great reporting on all business numbers that you need for clear-headed decision making. A smaller practice that is closing a few cases a month can easily maintain numbers on Google or Excel spreadsheets. As you grow, additional tools are needed. We have never found a CRM system good enough to earn our seal of approval, but it is a hot topic of discussion in the masterclass!

We are exploring the option of creating of a complete custom CRM system that would integrate many of the tools you are currently using into a single login and interface. We would add in functionality for streamlined case tracking and killer reporting. *[Please join our waitlist](#) if you would be interested in this CRM.*

LOOKING FOR MORE?

JOIN THE

WAVE THREE MASTERMIND COMMUNITY

Transform your practice into a top-performing business you truly enjoy.

Learn live online from experienced experts who have been where you are and will support you on your path forward.

- Design your business around the lifestyle you want to lead
- Replace complexity with a simple, proven path to scale
- Put the right people in the right roles and empower them with systems to succeed
- Transition from business operator to business owner
- Untie your presence in the office from the profitability of the business
- Unlock freedom, flexibility, and fulfillment

[Click here](#) to find out more about the Wave Three.

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