



 TRUE ADVISOR

A LIFESTYLE-FIRST
BUSINESS PLANNER
FOR FINANCIAL ADVISORS

THE
PRODUCER'S
PLANNER

VISION

SIGNIFICANT ACCOMPLISHMENT STARTS WITH CLEAR VISION

This thought experiment will help you articulate your vision for yourself and your business. Imagine your ideal self and ideal business. Take some time to think about who this person is and what that business looks like. What particular skills and traits do you possess as this future version of you? Write out 5 or so “I” or “My” statements in the present tense in the Vision boxes. For example, “I am healthy and energetic.” Then, for each of these vision statements, write at least one corresponding habit that would be needed to possess this skill. The timeframe for this experiment is up to you. Just make sure your visions are something that seem reasonably attainable to you. You can progress toward larger goals each time you come back to this exercise.

WHO IS THE PERSON YOU WANT TO BE?

VISION

HABITS

>

WHAT IS THE BUSINESS YOU WANT TO OWN?

VISION

HABITS

>

FOCUS

NARROW YOUR FOCUS TO MOVE TOWARD VISION

Tony Robbins said, “Most people overestimate what they can do in a year and underestimate what they can do in 2 or 3 decades.” To make the biggest impact over time, we must focus on a small set of accomplishments in the short term. Out of your list of habits on the VISION page, pick a few that are *truly realistic* to incorporate into your life in the next few months. Then write specific tasks and routines to support these priorities.

PRIORITY HABITS PERSONALLY

REALISIC FOCUS FOR NEXT 3-6 MONTHS



ASSOCIATED TASKS

DUE DATE

DUE DATE

DUE DATE

DUE DATE

DUE DATE

PRIORITY HABITS PROFESSIONALLY

REALISIC FOCUS FOR NEXT 3-6 MONTHS



ASSOCIATED TASKS

DUE DATE

DUE DATE

DUE DATE

DUE DATE

DUE DATE

MORNING & EVENING ROUTINES TO SUPPORT PRIORITIES

AM

PM

WEEKLY REVIEW AND PLAN

Use this page to ensure that you accomplish items from the FOCUS page each week. Be sure to recognize what you did well last week! Use the brain dump section to write out all the to-do's on your mind and narrow them down to the most important.

REVIEW OF LAST WEEK

WINS

HOW I WILL IMPROVE

TASKS DUE THIS WEEK FROM PRIORITIES SCHEDULE THESE ON CALENDAR

BRAIN DUMP

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FINAL TO DO FOR WEEK

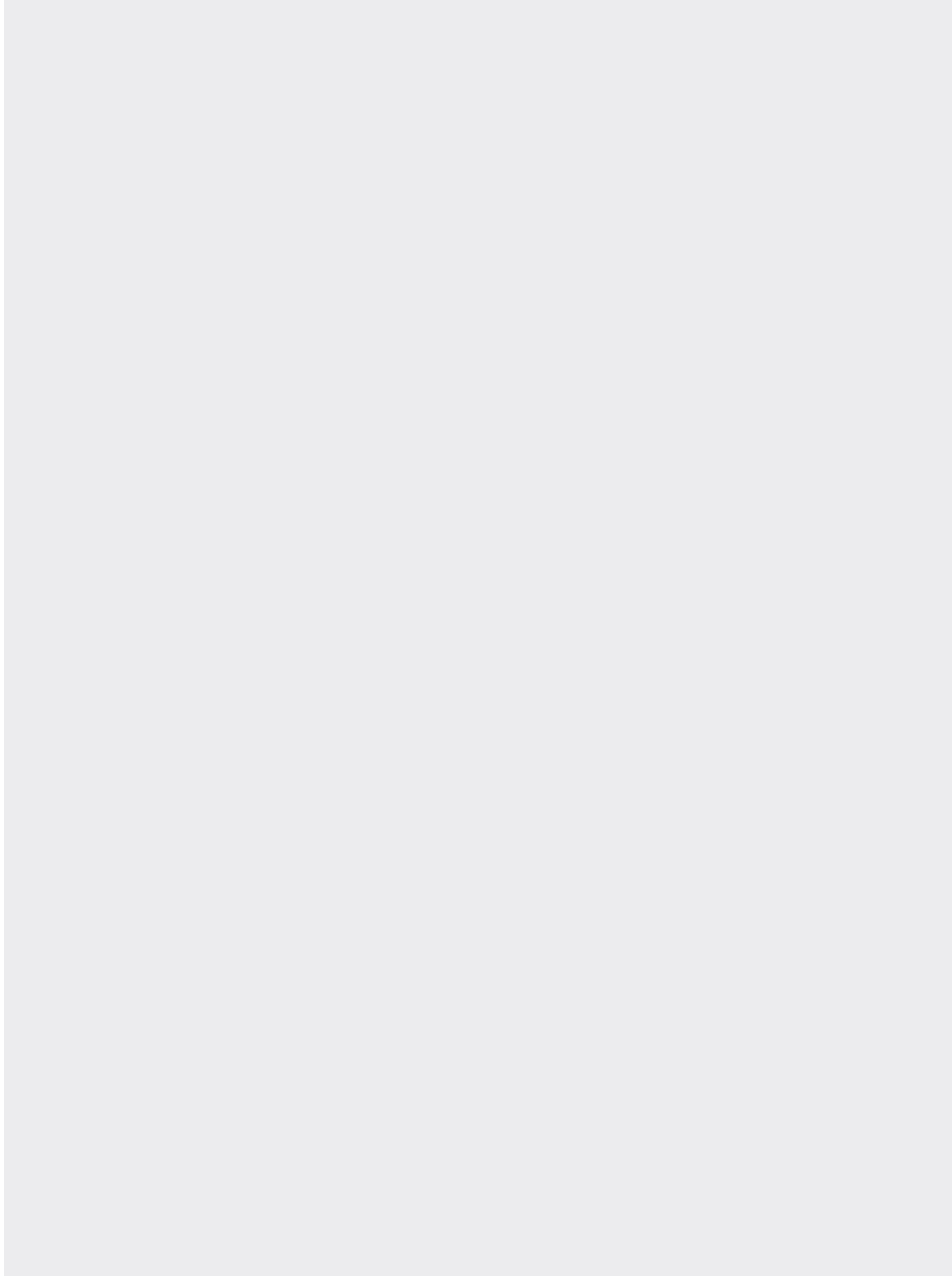
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DAILY

THE FUTURE ARRIVES ONE MOMENT AT A TIME

Fill this section out once per focus cycle and refer to it daily to keep yourself on track and affirm the path you're on.

GRATITUDE, PRAYERS, AFFIRMATIONS



PREP QUESTIONS

TO STAY ON TRACK AND PREP FOR TOMORROW

- 1.
- 2.
- 3.
- 4.

DAILY HABITS



