

Know Where to Focus Your Efforts



Your Progress Report

The first thing you and your team should do is to set up a time to conduct a thorough review of where you are in this program. This involves discussing each of the best practices covered to date (including this one) and identifying the status of each. You can use the “Progress Report” in your binder to easily capture this assessment.

You will be itemizing each best practice as follows:

- Started It
- Making Progress
- Complete!



Your Annual Best Practices Check Up

We are also on the cusp of significant business succession where many advisors are selling their business and reaping the rewards of their hard work in the form of stellar retirement. Regardless of which side you are on – the one retiring *or* the one acquiring their clients – the benefits are many to know where to focus.