Course Outline for “How to Turn Your Successful Practice Into a Balanced Personal Life”

This is a 1 hour, in person, “classroom” style course.

The intent of the course is to help advisors apply the principals of running a good insurance practice & agency in their personal lives.

Course will begin with introductory discussion – interactive – on some of the books and methods advisors use today to help build, maintain, and expand their businesses.

Specific books will be referenced and highlighted.

From there the course will focus on examining attendees personal life, organizations they work in, the agency/practice they work in and how to better understand the expectations from those roles.

Attendees will be given a method on how to “audit” their roles and responsibilities with people who rely on them and how to work throughout the year to achieve better results.

With a results focused mentality attendees will begin to understand our roles and lives are not about “seeking balance” in what we do but rather focusing on working toward the expectations people have of us to ultimately lead a more fulfilling life.