

# "WHAT I DO" STORY

If a picture is worth a thousand words, then a metaphor is worth a thousand pictures. One good illustration can save 60-minutes worth of explanation, reasoning, justification, comparison, and analysis.

To create your "What I Do" Story, complete these open-ended statements to identify your own stories to share with your clients and prospects to describe what you do. See the second page for a few examples from successful advisors.

**What I do is kind of like...**

**The people I most enjoy working with...**

**The value I strive to bring to my clients...**

# SAMPLE STORIES

**When creating your own story, ensure that the story resonates with you. But don't limit yourself to just one story as different stories will resonate with different individuals.**

## What I do is kind of like...

- putting together a puzzle. There are many facets of your life that make up your financial puzzle. As we learn more about your past, present, and future, your financial picture comes into focus and then we can identify where pieces are missing.
- being a mountain guide. I help you find the safest way to your destination while avoiding potential financial pitfalls.
- coaching a basketball team. I provide a financial gameplan, help motivate you when improvements are needed, and when there is a loss we make strategy changes with the main aim to enjoy the game of life.
- planning a trip from the East Coast heading to the West Coast. We check the tires, gas, maps, and places to stay. In a similar way, we help you plan your financial road trip from where you are today mapped out to age 100+. Our job is to help you avoid roadblocks to your final destination.
- having a personal physical trainer. As your Fiscal trainer, we need to understand your financial strengths and weaknesses and keep you accountable toward your goals.
- surfing. Too many look for the great wave to make them rich. If you are risk-adverse, you should avoid that wave and ride the more moderate wave.
- gardening. It takes a lot of planning and preparation to design, plant, and nurture a garden. The same way you don't just plant anything anywhere, you can't just plant your money anywhere and expect it to grow.