

**Live Life on Purpose: How to make time work for you in an overworked world.**

**Dr. Travis G. Parry**

Text Time to (844) 846-3007 for the slides

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**Mike's Story**

Seasoned Financial Advisor working 50+ hrs/week

I am in a constant fog and can't seem to focus on getting home.

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**Financial Planning Association Study (2014)**

Financial Pros

- 75% work more than 40 hours/week
- 33% work more than 50 hours/week!

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**Harvard Business Review & The Alternative Board**

Business Owners

- Works 72-hrs/week
- Only wants to work 41 hrs/week

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**Financial Planning Association Study (2014)**

• Biggest Obstacles?

- Trying to do too much
- Administrative burden
- Procrastination

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**Inc Magazine and Agility (2016)**

Wastes 22 hrs/week on:

1. Email
2. Administrative tasks

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## Workaholic-DSM 5

- highly involved in work
- neglecting relationships
- feels driven to work because of guilt or avoiding depression
- low levels of work enjoyment.
- 1/10 adults in USA are workaholics
  - **3/10 Financial Pros** work more than 50 hrs/week
  - **5/10 Business owners** work more than 50 hrs/week

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## The Financial Advisor's Guide to Work/Life Balance

Restoring Work-Life Balance Article

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## Time Management-Priorities



How many on their deathbeds wished they'd spent more time at the office - or watching TV? The answer is, No one.

— Stephen Covey —

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## How's your work/life balance?

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## Are you living your life's purpose?

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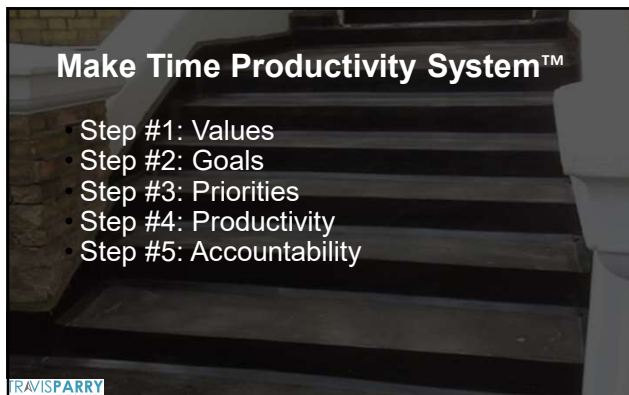
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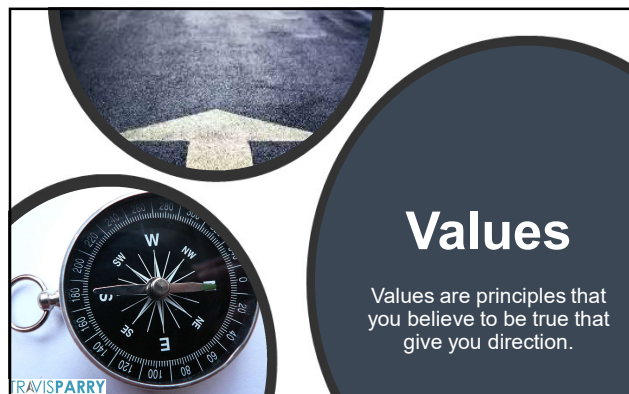


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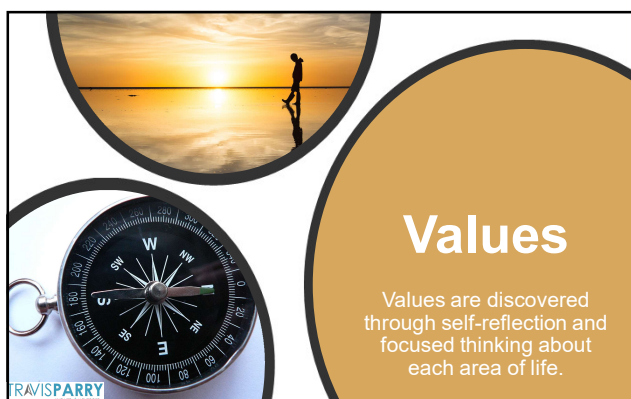




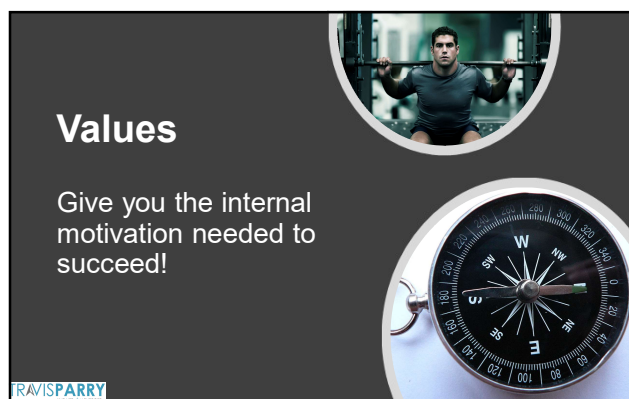
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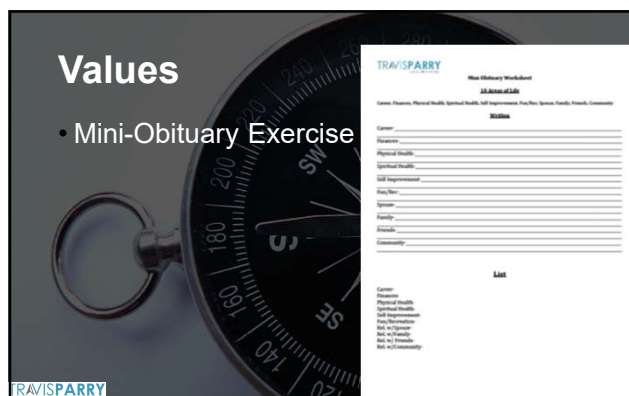
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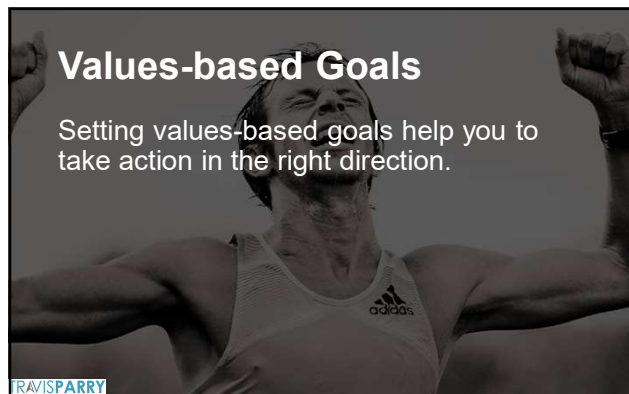
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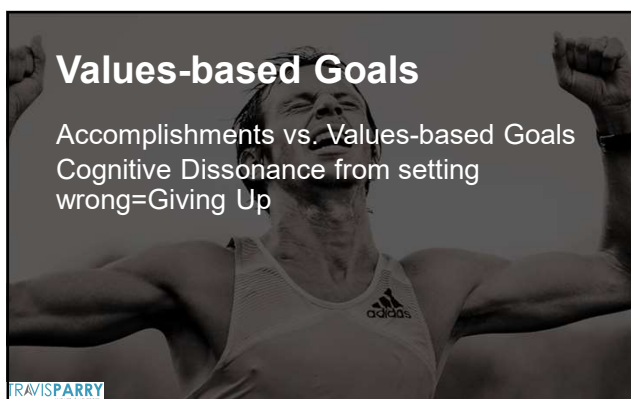
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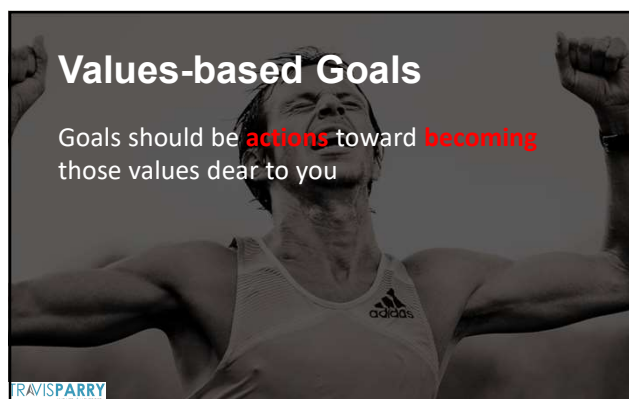
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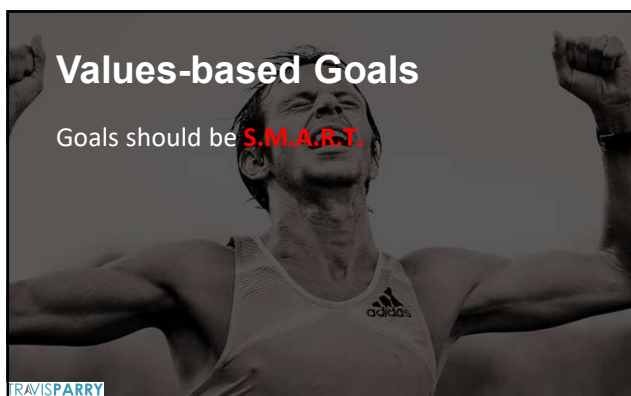
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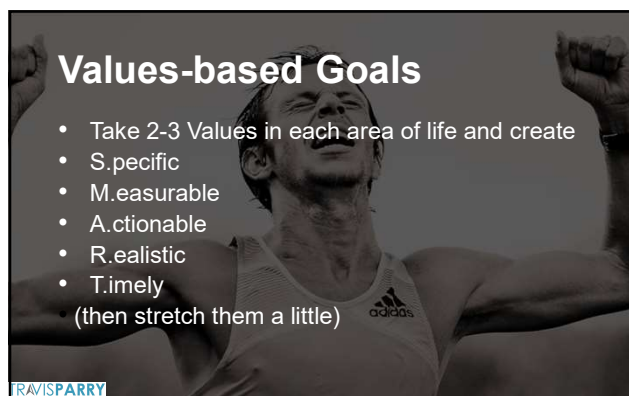
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## Values-based Goals

Do you have your own values-based S.M.A.R.T. goals?

**TRAVIS PARRY** Life Goals Worksheet

Values Goals: Specific, Measurable, Achievable, Realistic, Timely

"In 1 year I will..."

Career:

Finance:

Physical Health:

Spiritual Health:

Self Improvement:

Fun Recreation:

Relationship with Spouse:

Rel. w/ Family:

Rel. w/ Friends:

Rel. w/ Community:

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## Step #3: Priorities

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## Priorities

- Prioritize your Values-based Goals through strategic time management.

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## Priorities

Most spend too much time trying to do everything!

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## Priorities

Do you have a working time management system that is helping you live your priorities?

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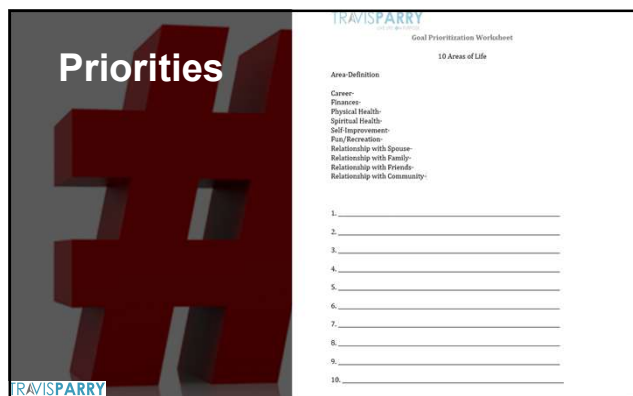
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## Priorities

Prioritize your work activities  
Make Time away from work a priority!

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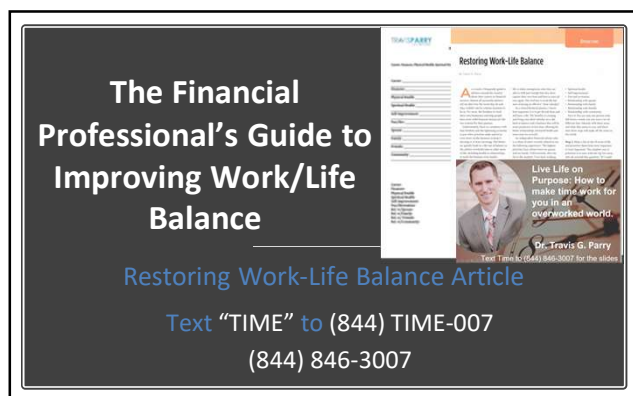
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## Step #4: Productivity

It is not the magic pill!



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## Step #4: Productivity

Productivity has two main components:

1. Organization
2. Processing

productivity

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## Step #4: Productivity

**Organization** is about getting rid of all:

- distractions,
- minimizing contact points,
- and having physical locations for information.

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## Step #4: Productivity

**Processing:** step-by-step rules to follow to keep it organized.



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## Step #4: Productivity

### Processing Steps

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Business Processing Steps

Instructions:  
(To use with all internet-voicemail, texts, email, physical, notebook etc.)

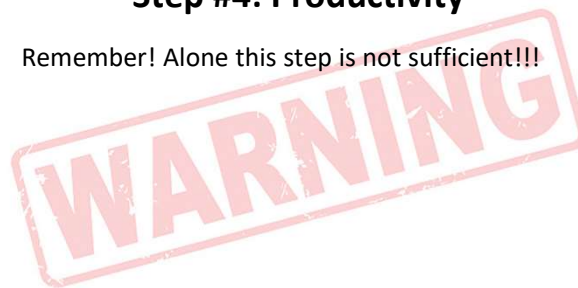
1. Is this task worth doing?
  - a. If yes, delete/delete away.
  - b. If yes, continue.
2. Can I do this task in 5 minutes or less?
  - a. If yes, DO IT NOW!!!
  - b. If not, then does it have a due date or take longer than 10 minutes?
    - i. If yes, then CALENDAR IT!
    - ii. If no, create a reminder for that will remind you at a future date to revisit this task.

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## Step #4: Productivity

Remember! Alone this step is not sufficient!!!



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### Step #5: Accountability

Spouse or other accountability partner to help you keep your Ideal Calendar

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### Step #5: Accountability

- Accountability Partner/Spouse to help you keep your Ideal Calendar and reach your goals.
- Couple Development Time 1/week
- Couple Money Time 1/week
- Couple Time

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### Recap

Financial Professionals need work/life balance

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### Recap

Productivity does not equal work/life balance

Living your life's purpose by creating your Ideal Calendar does

Important

- Crisis
- Pressing Issues
- Meetings

- Preparation
- Planning
- Personal Development

III

- Interruptions
- Some mail
- Many popular activities

IV

- Trivia
- Some phone calls
- Excessive TV/Games

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### The Financial Professional's Guide to Improving Work/Life Balance

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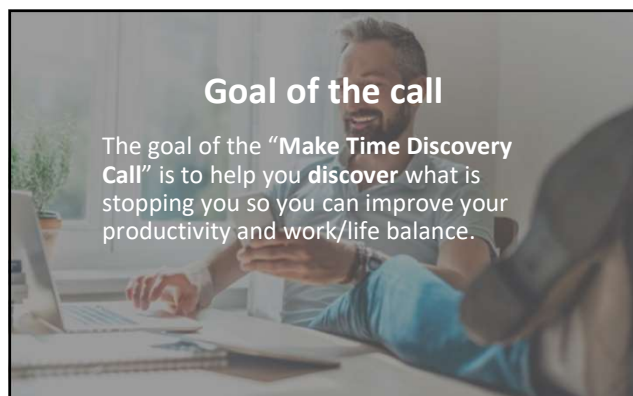


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### "Make Time Discovery Call" is all about

Helping you to improve your productivity and increase your income.

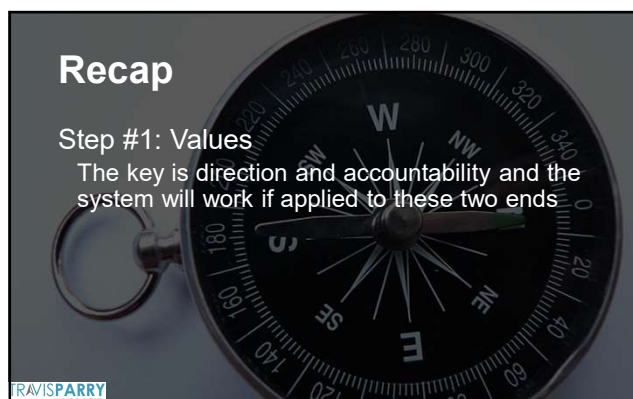
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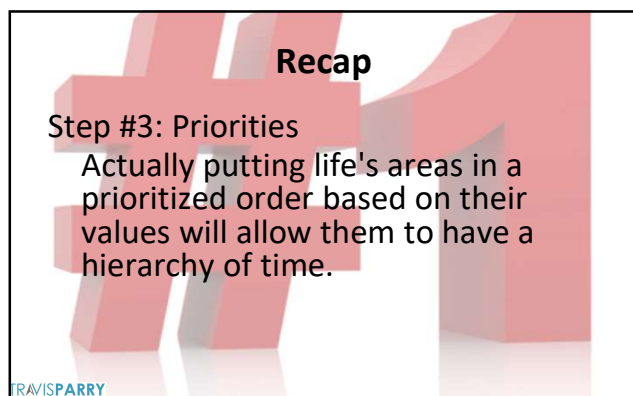
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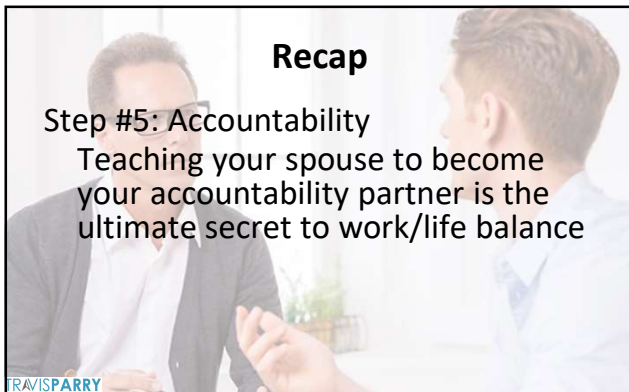
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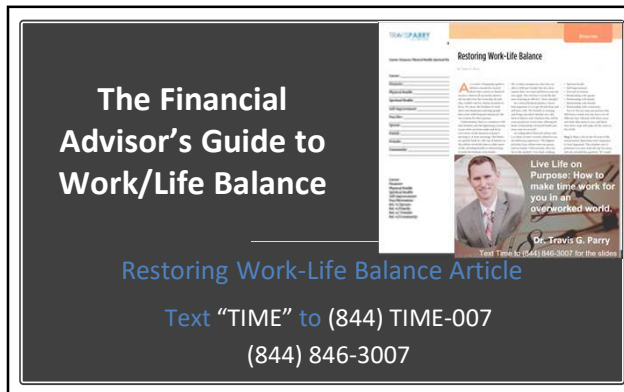
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**Recap**

**Step #5: Accountability**  
Teaching your spouse to become your accountability partner is the ultimate secret to work/life balance

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**Hire me to speak for your group.**

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