



YOU HAVE SOLD YOUR PRACTICE. NOW WHAT?

DEAN KENDALL

You are likely contemplating how to invest your money? But asking where you should invest your money is the wrong question. The right question is, what are your most deeply held values? What are your life goals? Only in the context of those answers can you make wise and sound investment decisions in the context of the ideal life you wish to live.

You need a grounded design for your ideal life and only then can you begin to start living into it today and not in some imaginary future. Without a true design for your ideal life, you can't possibly determine when you'll be able to retire, how much you'll really need, or even where your ideal location will be. Where you invest and how you invest are radically different depending on the design for your ideal life.

In my experience, business owners do not think about and are not truly prepared mentally for the next phase of their life. They have been operating their business(es) for decades and with that comes control, power and authority. The moment you exit, the purpose of your life has shifted, everything you know about your life changes in an instant. Are you prepared for that?

That is why I insist that every one of my business clients goes through what we call The Financial Road Map® experience. It prepares you for what is next and provides a crystal-clear mental image of what the next chapter of your life needs to look like, sound like and feel like.

We spend a significant amount of time determining your most deeply held values, your most important

goals and creating a crystal-clear design for your ideal life, which is why my firm is called Ideal Life Experience. We complete all the design work on the front-end because it's my belief that "prescription before diagnosis is malpractice."

You cannot make investment or financial decisions in a vacuum. If you have not first designed your ideal life all the rest is just silliness, it really is malpractice. You see pundits on TV and in magazines spewing advice, yet none of them know your situation, so how can it be applicable? The truth is that it isn't.

DESIGN is creating something ON PURPOSE for a PARTICULAR PURPOSE. Think about Da Vinci's statue of David.

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Da Vinci had a complete and perfect picture of David in his mind's eye before he ever picked up a chisel. Ferrari engineers never produce one of their exceptional automotive sculptures until the design has been perfected through many revisions.

Most of us spend more time planning our vacations than we spend planning our ideal financial future and ideal life design. We spend more time planning and worrying about our retirement money than we spend designing how we'll spend that money to make our lives extraordinary. After all, what is the point of saving your entire life for retirement without a real plan for how we will spend our time and money when we get there?

The way most people think about money is I'll just work hard to accumulate a big pile of money then I'll be able to retire and do whatever I want.

This strategy is dead wrong because you cannot start with money until you know how much you will need for each specific purpose. You don't know how big of a pile to build, and if you're working too much or too long, as many dentists do, you are trading something – your priorities (health, family, relationships, etc.) for a huge pile of money that you may not need.

Money comes last, your vision for your ideal life comes first. What people need to become truly wealthy and stress-free is an Integrated Aligned Overarching Strategy.

The ability and knowledge to create and document a robust Integrated Aligned Overarching Financial Strategy and the faith, patience, and discipline to keep you from blowing up that strategy at some fleeting moment is essential to success.

This goes way beyond an "investment plan" which is simply one small component of an Overarching Financial Strategy.

An Overarching Financial Strategy defines in writing exactly how you will reach your goals. It covers every area of your financial life (tax minimization strategies for every stage of your life, legal including wills, trusts and estates, money management including debt design and real estate management, every kind of insurance, and financial planning to tie it all together with your values, vision and goals) and is updated regularly (at least annually).

Your Overarching Financial Strategy provides a clear picture of how to move forward and address all significant financial issues in a single living document.

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The result of these comprehensive services is that you experience a process that will:

- Create the greatest probability that you will accomplish all your goals which require money and planning to achieve
- Coach you how to begin “living into” Your Ideal Life immediately, especially your non-financial goals
- Ensure that you make smarter choices about your money in all areas of finance
- Be highly proactive so that no opportunities are overlooked and no financial issues blow up
- Enable you to relax about your finances, knowing that your team has your back and is proactively working on your behalf to enable you to move ever closer to living Your Ideal Life

Note: This may be the most important paragraph in this article:

What is the scarcest commodity on Planet Earth? It is not gold or diamonds or money. It is TIME! Time is what we all have too little of, yet we are willing to squander precious YEARS of it NOT achieving our goals because we are simply too lazy to do our homework on our financial lives and the advisors we choose. This is an enormous waste of human potential. You can be living Your Ideal Life much sooner than you imagine, but you must take action right now to get it on track.

The ultimate goal of this entire process is to enable you to be FREE to use your precious time in the ways that you choose on your most important priorities. The definition of true wealth is complete control over your time. Money is just an enabler of that control. The advisor’s job is to ensure you have all the money you need to live life exactly as you choose.

The outcome is people are much calmer due to newfound confidence in their future, always knowing if they are on track or off track and making course corrections to achieve each of their goals. They are actively focused on living their values and living into their Ideal Lives right now.

You Don’t Have to Wait until you sell your practice!

You can start living your Ideal Life right now. In fact, I’ll bet you that as soon as you have your design on paper, you’ll begin making immediate changes to get there.

If you are ready to get really serious about living your Ideal Life and getting your financial house in perfect order, please call me at 403-543-7226 or email me at dean@ideal-life-experience.ca to get started. ***