

# *“Planning” for Success*

Ensuring Project Success for Your Clients is Just  
Like Ensuring Financial Success for Yourself

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# This Presentation

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# *Project Planning & Management Quotes*

- Nothing is impossible for the person who doesn't have to do it.
- If everything is going exactly to [plan](#), something somewhere is going massively wrong.
- The sooner you get behind schedule, the more time you have to make it up.
- The nice thing about not planning is that [failure](#) comes as a complete surprise rather than being preceded by a period of worry and depression.
- Fast – Cheap – Good – you can only have **two**.
- If you're 6 months late on a [milestone](#) due next week but really believe you can make it, you're a Project Manager

# Deadline Extension Tool...

Extensis View Window Help

Undo Stupid Changes Ctrl+Shift+S

Read Boss' Mind Ctrl+Alt+R

Adjust Boss' Attitude Ctrl+Shift+A

Create Idea Ctrl+I

Insert Brilliance Ctrl+B

Extend Deadline Ctrl+D

Enhance Salary Y Ctrl+Y

Find Better Client Ctrl+Alt+C

Restore Wasted Evenings Ctrl+W

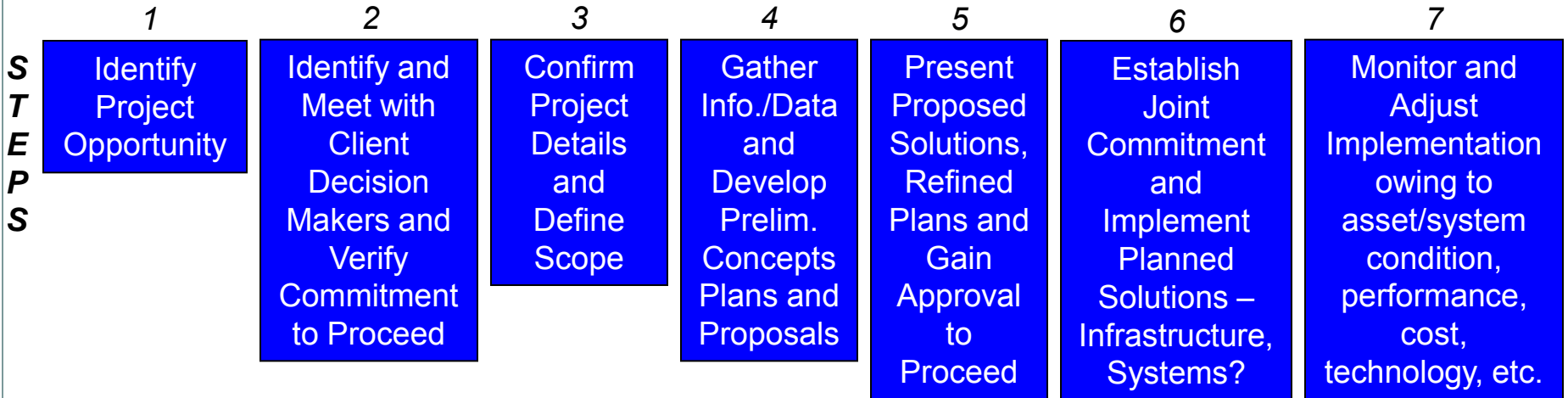
Save Weekend Ctrl+S

# Outline:

- Project Planning Life Cycle
- Financial Planning Life Cycle
- Parallels and Benefits
- Summary
- Questions
- Next Steps

# Project Planning Life Cycle

Time (weeks, months, years) →

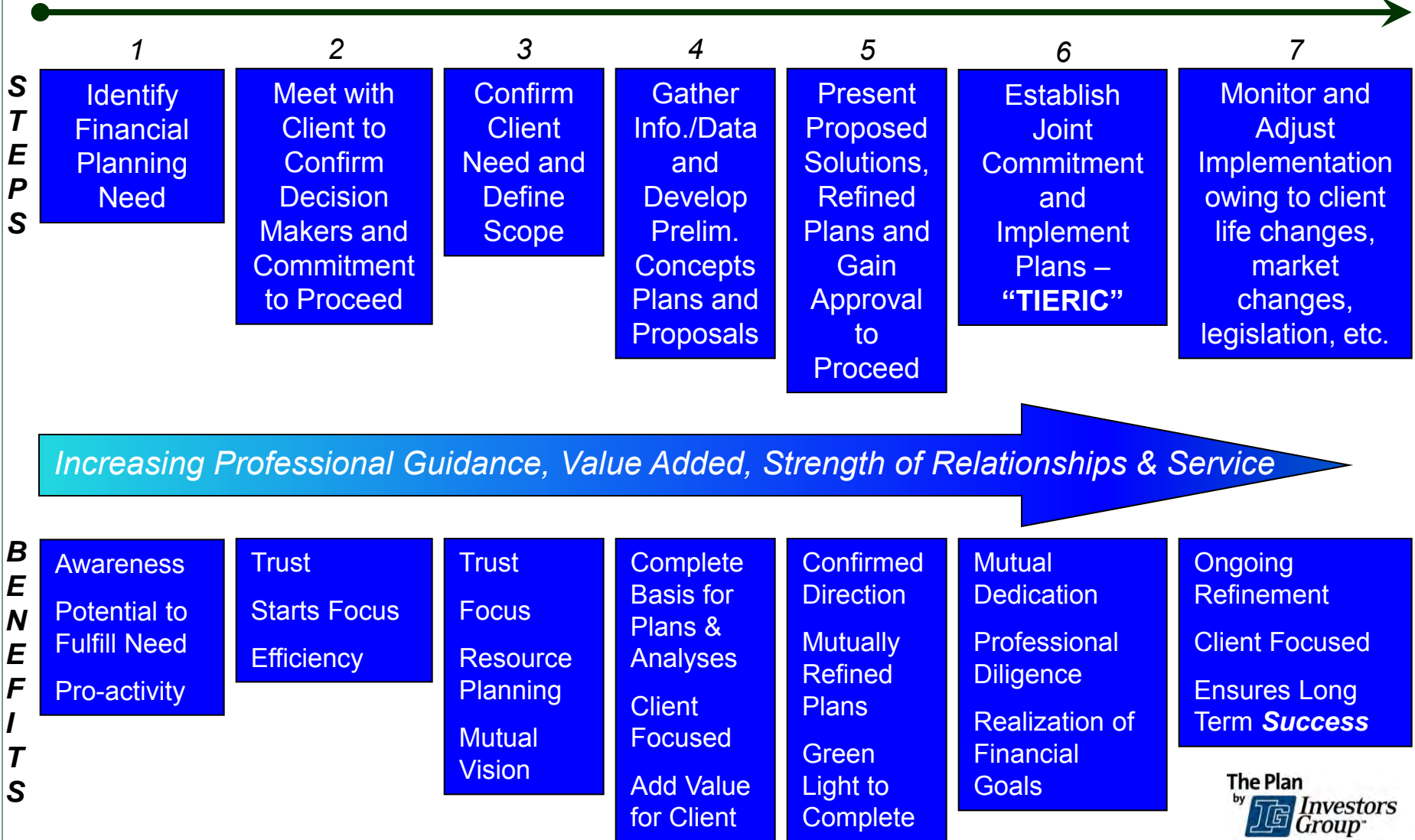


*Increasing Professional Guidance, Value Added, Strength of Relationships & Service*



# Financial Planning Life Cycle

Time (weeks, months, years) →



The Plan  
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# *Parallels & Benefits:*

Both planning processes:

- Are **comprehensive, pragmatic** and **proven**;
- Incorporate client input **and** professional advice;
- Are iterative to **allow refinement** and agreement;
- Are based upon **trust, competence and diligence**;
- Are **customized** to specific client needs/goals;

# *Parallels & Benefits (cont'd):*

Both planning processes:

- Achieve **mutual commitment** of client and advisor;
- Must be supported by **proper documentation**;
- Allow **risk identification** and **risk mitigation**;
- Are fundamental to Professionals.
- Provide immense **inherent value** in themselves.

## *Summary:*

Project Planning is something you all do, have done or will do. Its need and benefits to you, your clients and profession are widely recognized and accepted. Proper Financial Planning is exactly the same.

***BUT . . . Do busy professionals always look after themselves and their families as well as they look after their clients?***

**DO YOU?**

## *Summary (cont'd):*

Committing to Financial Planning for **personal goals:**

**T**ax planning

**R**etirement planning

**I**nvestment planning

**I**nsurance planning/Risk Mitigation

**E**state planning

**C**ash management

can ensure **financial success** for you and your family just as you ensure project success for your clients.

*Spend some important planning time on yourself!*

# *Best Laid Plans*

*Your plan said you'd do what you should  
And you did the best that you could  
But when the going got tough  
And it wasn't enough  
It was better bein' lucky than good*

*Limerick adapted from Don McAlister, 1/4/98*

# Questions?

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# *Next Steps:*

- Complete Seminar Evaluation form
- Authorize follow up
- Log CPD credits
- Apply learning at home/work

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