

The Focused Holistic Approach™



Assisting You in Making Wise Decisions

The Focused Holistic Approach™

Our Program

Sue Hansen is a financial coach.

Sue has created a unique process for business owners and professionals called ***The Focused Holistic Approach™***.

It helps you **focus** on your most important goals and achieve them in a values based, **holistic** fashion.



Hansen's Advisory Services Inc.
7067 East Genesee St., Fayetteville, NY 10366
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SK 2

The Focused Holistic Approach™

Program Overview

The Focused Holistic Approach™ helps you focus on your most important goals and achieve them in a values based, holistic fashion. *The Focused Holistic Approach™* will help you improve the quality of your life, protect and empower your family, and achieve your goals.

Most successful individuals have already achieved many goals, but they may still lack confidence in their future and find themselves on the Uncertainty Treadmill. They may feel frazzled, and be disorganized, with no clear plan for the future. Their goals may not be clarified, articulated, or written down. They may be stuck in the past and not have a vision for the future. They may not know how much money they have or what they owe. Monthly spending may not be properly tracked. They may be uncertain their assets will be sufficient to meet their future needs. They may be vulnerable to too much tax. Their legal documents may be disorganized and incomplete. As well, they may blame other people and outside forces for many of their problems. They may receive conflicting information from a variety of sources, and advice that they do not understand or know how to use. As a result, they may feel frustrated, confused, and worried about the future. This uncertainty may cause them to procrastinate on making important decisions and they may not be enjoying life to the fullest. We call this **The Uncertainty Treadmill™** and that's why we created *The Focused Holistic Approach™*: to help you focus on your most important goals and achieve them in a values based, holistic fashion.

The Focused Holistic Approach™ is a step-by-step process divided into three distinct stages. In stage one, we help you assess your current situation and set goals, both personal and financial. Working together in stage two, we help you develop strategies and a **Vision Fulfilment Plan™**. In stage three, we help you develop a **Focused Holistic Team™** and implement your plan.



The Focused Holistic Approach™

Program Overview Continued

We developed this process working with our clients during the past twenty-two years. We help them understand their current situation, both strengths and weaknesses, and create a powerful vision for their future. Then we look at the roadblocks standing in their way, develop strategies to overcome them, and review all of the tools to help them achieve their vision.

To help you get started with our process, you can participate one-on-one in **The Vision Clarity Workshop™**. During the session, you work with us through the first stage of our process. When you've completed the session, you'll be ready to participate in **The Focused Holistic Program™**, designed to help you develop and implement your *Vision Fulfilment Plan™*. You can also take advantage of **The Focused Holistic Toolbox™**, our full suite of tools and capabilities.

When you have completed the process, you will be focusing on your most important goals and achieving them in a values based, holistic fashion. You will have a clear, powerful vision for the future. Your defined goals will be effectively communicated to your advisors and loved ones. You will be focused on the future. You will know how much money you have and where and how it is allocated. You will be managing your debt. Monthly spending will be properly tracked. Your retirement income needs will be more clearly understood and you will have a plan in place for protecting and growing your retirement savings. Tax liabilities will be minimized. Your legal documents will be organized and complete. You will have a single source of trusted advice. You will feel satisfied with your progress and confident about your future. You will accept responsibility for your actions. Your increased knowledge will help you make better decisions with confidence. You will be enjoying life to the fullest. And, most importantly, you will be improving the quality of your life, protecting and empowering your family, and achieving your goals.

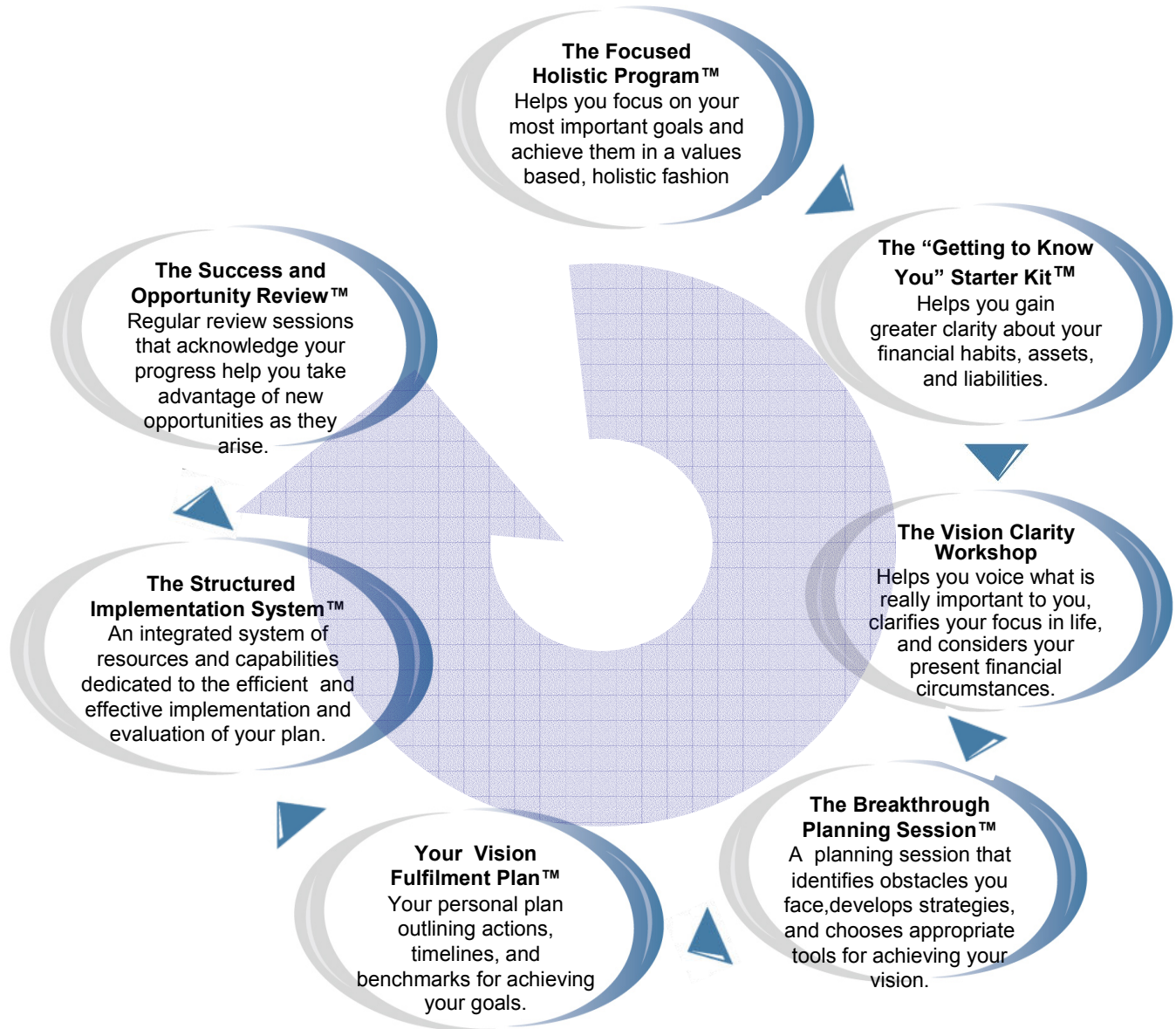
For information about *The Focused Holistic Approach™* call 315.637.5153



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The Focused Holistic Approach™



The Focused Holistic Approach™

The Focused Holistic Approach™ helps you focus on your most important goals and achieve them in a values based, holistic fashion. Created by Susan Hansen, *The Focused Holistic Approach™* will help you improve the quality of your life, protect and empower your family, and achieve your goals.

When you have worked through ***The Focused Holistic Approach™*** you will:

- *Have effectively communicated your goals to your advisors and loved ones;*
- *Know how much money you have and where and how it is allocated;*
- *Be managing your debt and properly tracking your monthly spending;*
- *Understand your retirement income needs and have a plan for growing your*
- *savings;*
- *Have organized and completed legal documents;*
- *Have a single source of trusted advice;*
- *Feel satisfied with your progress and confident about your future;*
- *Accept responsibility for your actions;*
- *Have increased knowledge to make better decisions with confidence;*
- *Be enjoying life to the fullest.*

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The Focused Holistic Approach™

The Focused Holistic Scorecard™

To help you clearly understand your current situation, try *The Focused Holistic Scorecard™*. Rate your reactions to each pair of phrases. Decide where you lie on the scale from 1 to 10. Add up your total from each column.

1. Do not have a clear, articulated vision of the future.	1	2	3	4	5	6	7	8	9	10	Have a clear, well-defined vision of the future.
2. Do not have clear financial goals.	1	2	3	4	5	6	7	8	9	10	Have clear financial goals.
3. Do not have a strategy to achieve personal and financial goals in a values based, holistic fashion.	1	2	3	4	5	6	7	8	9	10	Have a strategy to achieve personal and financial goals in a values based, holistic fashion.
4. Do not have a step-by-step action plan to improve the quality of my life and protect our family.	1	2	3	4	5	6	7	8	9	10	Have a step-by-step action plan to improve the quality of my life and protect our family.
5. Do not properly track monthly spending.	1	2	3	4	5	6	7	8	9	10	Monthly spending is properly tracked and managed.
6. Uncertain if my assets will be sufficient to meet our future needs.	1	2	3	4	5	6	7	8	9	10	Understand my future asset needs and have a plan to grow retirement savings.
7. Receive conflicting and confusing advice from a variety of sources.	1	2	3	4	5	6	7	8	9	10	Have a single source of trusted and useful advice.
8. Filled with uncertainty and procrastinate in making important decisions.	1	2	3	4	5	6	7	8	9	10	Am knowledgeable about my affairs and am able to make informed and practical decisions.
9. Do not have a plan to use wealth to perpetuate our values.	1	2	3	4	5	6	7	8	9	10	Have a plan to use wealth to perpetuate values.
10. Do not have as much confidence in the future as I would like.	1	2	3	4	5	6	7	8	9	10	Have a strong sense of confidence about the future.
ADD COLUMN TOTALS											YOUR SCORE _____



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The Focused Holistic Approach™

Workshop Exercises

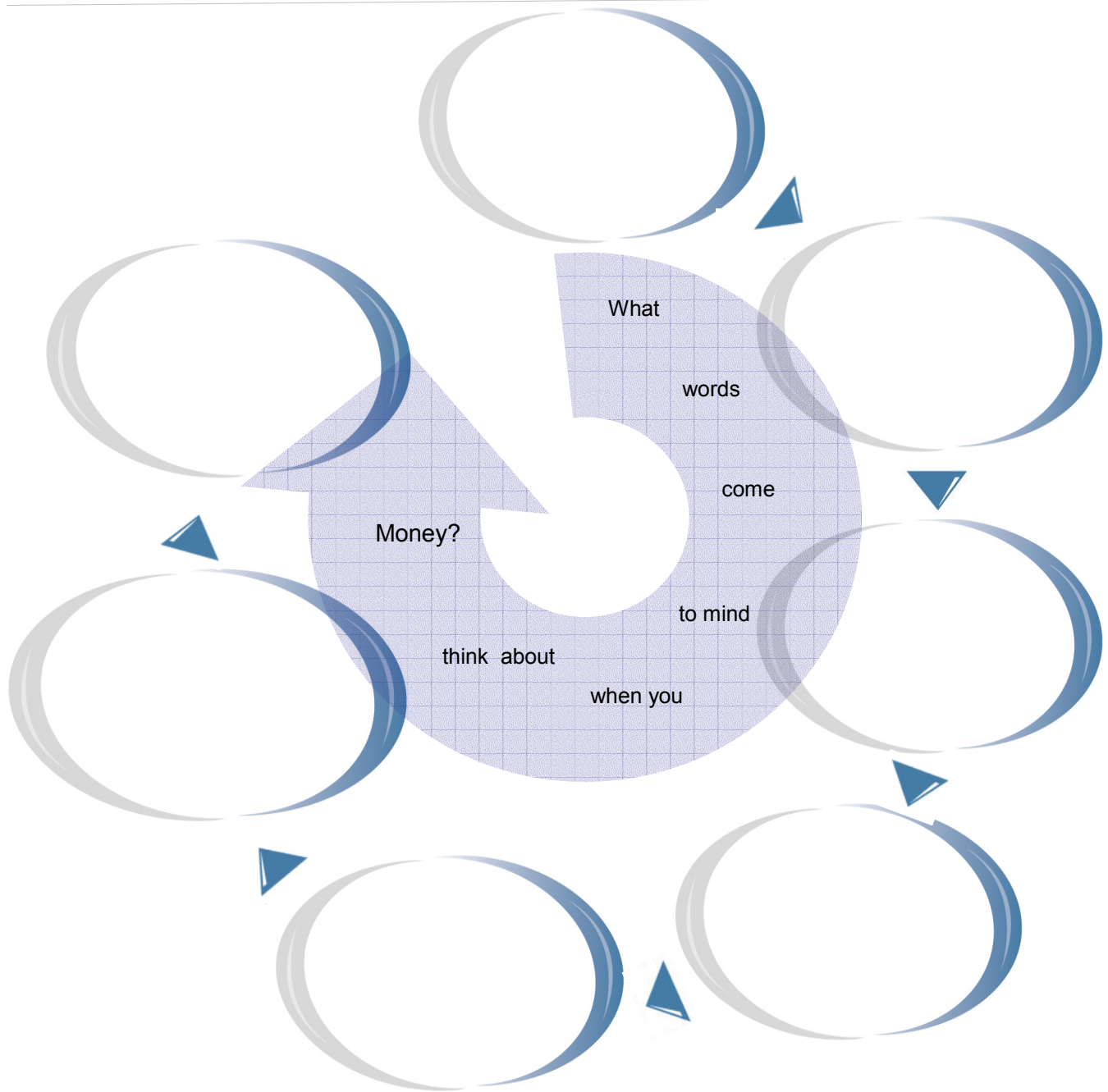


Name: _____

Date of Session: _____

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The Values Connection



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The Goal Advantage™

The R-Factor Question®*

If you and I were meeting one year from today, what would you have accomplished that would make you feel you were improving your lifestyle, protecting and empowering your family, and achieving your goals?

The D.O.S.® Platform*

What might get in the way of accomplishing these goals?

What opportunities could there be by achieving these goals?

What strengths do you have that would allow your goals to be accomplished?

Are you committed to achieving these goals?

*The R-Factor Question® and The D.O.S.® Platform are registered trademarks, copyrights and concepts owned by Strategic Coach, Inc. All rights reserved. Used with permission. www.strategic.coach.com



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Your Vision Statement

Vision Statement:



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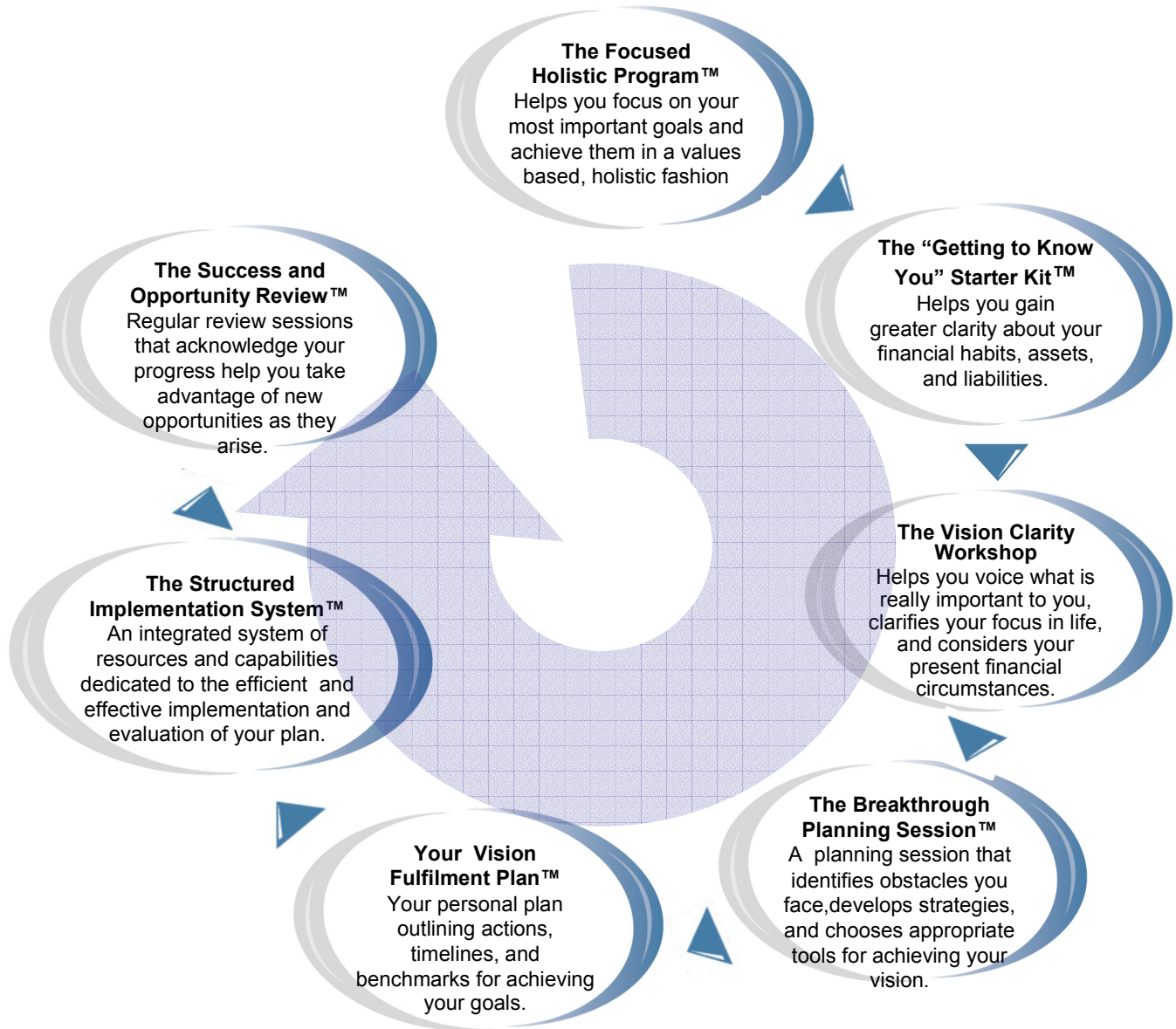
Planning Exercises



Member Name: _____

Date of Session: _____

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Resources

Income and Asset Protection:

Life Insurance

Disability Insurance

Long Term Care Insurance

Investment Vehicles:

Mutual Funds

Individual stocks and bonds

Partnership – real estate, equipment

Tax Responsibilities:

Tax Preparation

Tax Consultations

Estate Planning:

Will, health care proxy, power of attorney, living will

Trusts

Referrals:

Attorneys

Accountants

Mortgage Brokers

Real Estate Agents

Bankers

Social Workers, Therapists



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The Focused Holistic Approach™

The Vision Statement

What has to happen by the end of your life for you to feel you have achieved you lifetime goals?

--

Our Next Session (Date & Time)

--



The Focused Holistic Approach™

Our Progress & Action Worksheet

What progress have you achieved towards your vision?

--

Our Next Session (Date & Time)

--



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The Focused Holistic Approach™

Our Progress & Action Worksheet

What progress have you achieved towards your vision?

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Our Next Session (Date & Time)

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Referral Form

Who do you know that would benefit from
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Name: _____

E-mail: _____

Company: _____

Telephone: _____

**Why do you think this person would benefit from
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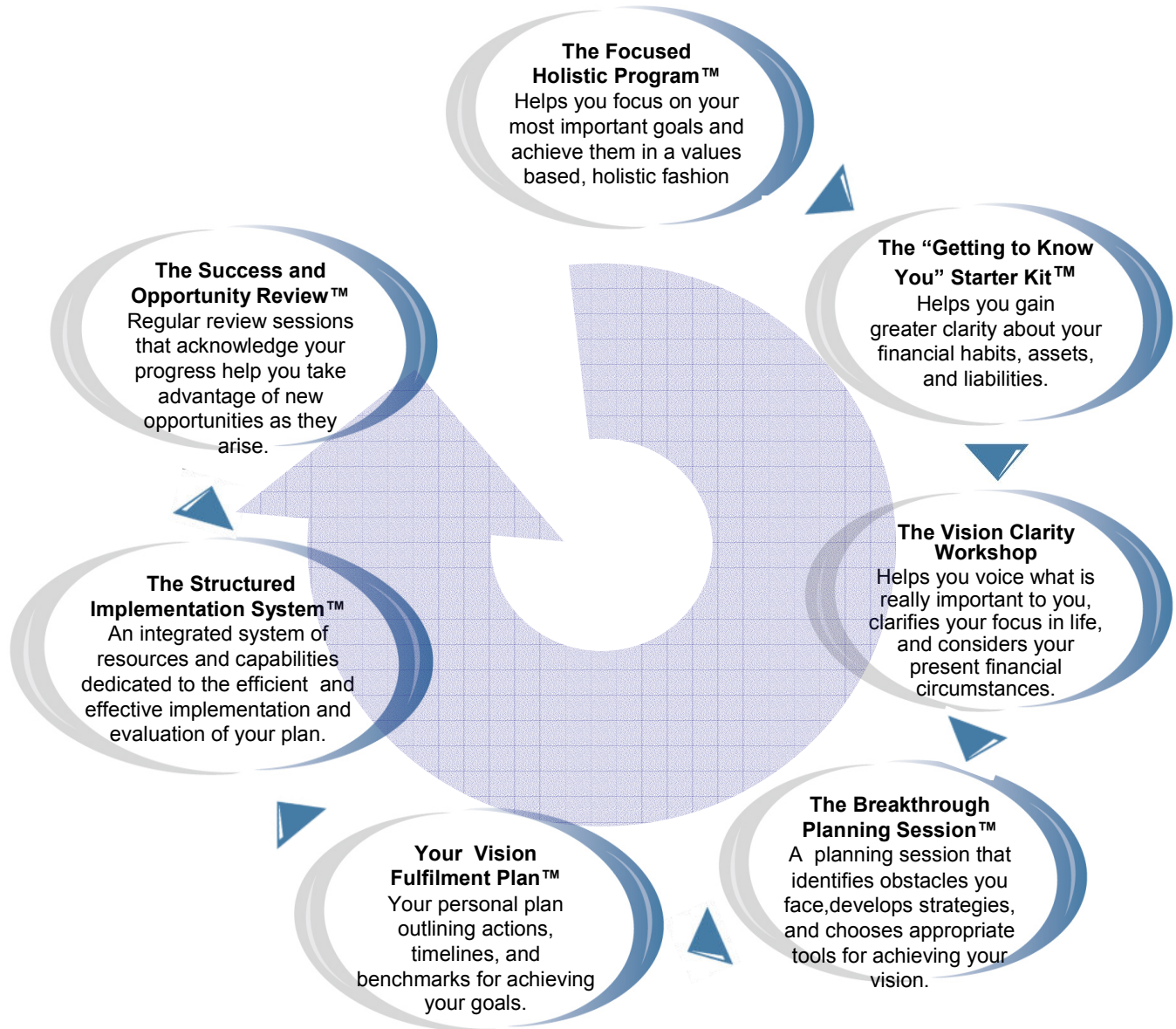
Review Exercises



Member Name: _____

Date of Session: _____

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Your Vision Statement

Vision Statement:

One year goals:



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The Focused Holistic Scorecard™

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ADD COLUMN TOTALS											YOUR SCORE _____



The Focused Holistic Approach™

The Focused Holistic Scorecard™

Why did you give yourself that score?

- | | |
|----|-----|
| 1. | 2. |
| 3. | 4. |
| 5. | 6. |
| 7. | 8. |
| 9. | 10. |

What could you do to improve your score?

- | | |
|----|-----|
| 1. | 2. |
| 3. | 4. |
| 5. | 6. |
| 7. | 8. |
| 9. | 10. |

Where could the improvement of that score lead?

- | | |
|----|-----|
| 1. | 2. |
| 3. | 4. |
| 5. | 6. |
| 7. | 8. |
| 9. | 10. |



The Focused Holistic Approach™

Our Progress & Action Worksheet

What progress have you achieved towards your vision?

--

Our Next Session (Date & Time)

--



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The Most Important Next Actions

What are your most important next action steps?

Action	Details & Delegations
Action	Details & Delegations
Action	Details & Delegations
Our Next Session (Date & Time)	



The Focused Holistic Approach™

Roots of Money

1. What most closely describes your family's financial status when you were growing up?

Poor

Middle Class

Upper Middle Class

Affluent

2. Who first taught you about money?

3. When you were growing up, who controlled the money in your household?

4. What did you learn?

5. Did you have your own money as a child?

Yes

No

6. If "yes", how did you acquire it?

_____ I worked for it

_____ Gifts

_____ Allowance

_____ I just asked for it

7. What lessons have you learned from having money? From not having it?



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SE8

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8. Recall an incident involving money while you were growing up and write about the impact it had on you.



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SE8

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The Aspirations and Opportunities Worksheet

Scenario A. You have reached a time in your life when you have all the money you need now and in the future.

What opportunities do you envision?

What are your aspirations?

How will your life change?

Scenario B. Imagine you have been told by a doctor that you have five to ten years to live. You will never feel sick and you will have no warning of your demise.

What opportunities do you envision?

What are your aspirations?

How will your life change?

Scenario B. During a doctor's visit you have been told you have only one day to live.

What has been left uncompleted in your life?

Adopted from "Seven Stages of Money Maturity" by George Kinder



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