

# The Focused Holistic Approach™



Assisting you in making wise choices

**Hansen's Advisory Services Inc.**

7067 East Genesee St., Fayetteville, NY 10366

Tel: 315.637.5153 Fax: 315.637.1264

# The Focused Holistic Approach™

## Our Program

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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.



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# The Focused Holistic Approach™

## Program Overview

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**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.



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# The Focused Holistic Approach™

## Program Overview Continued

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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.

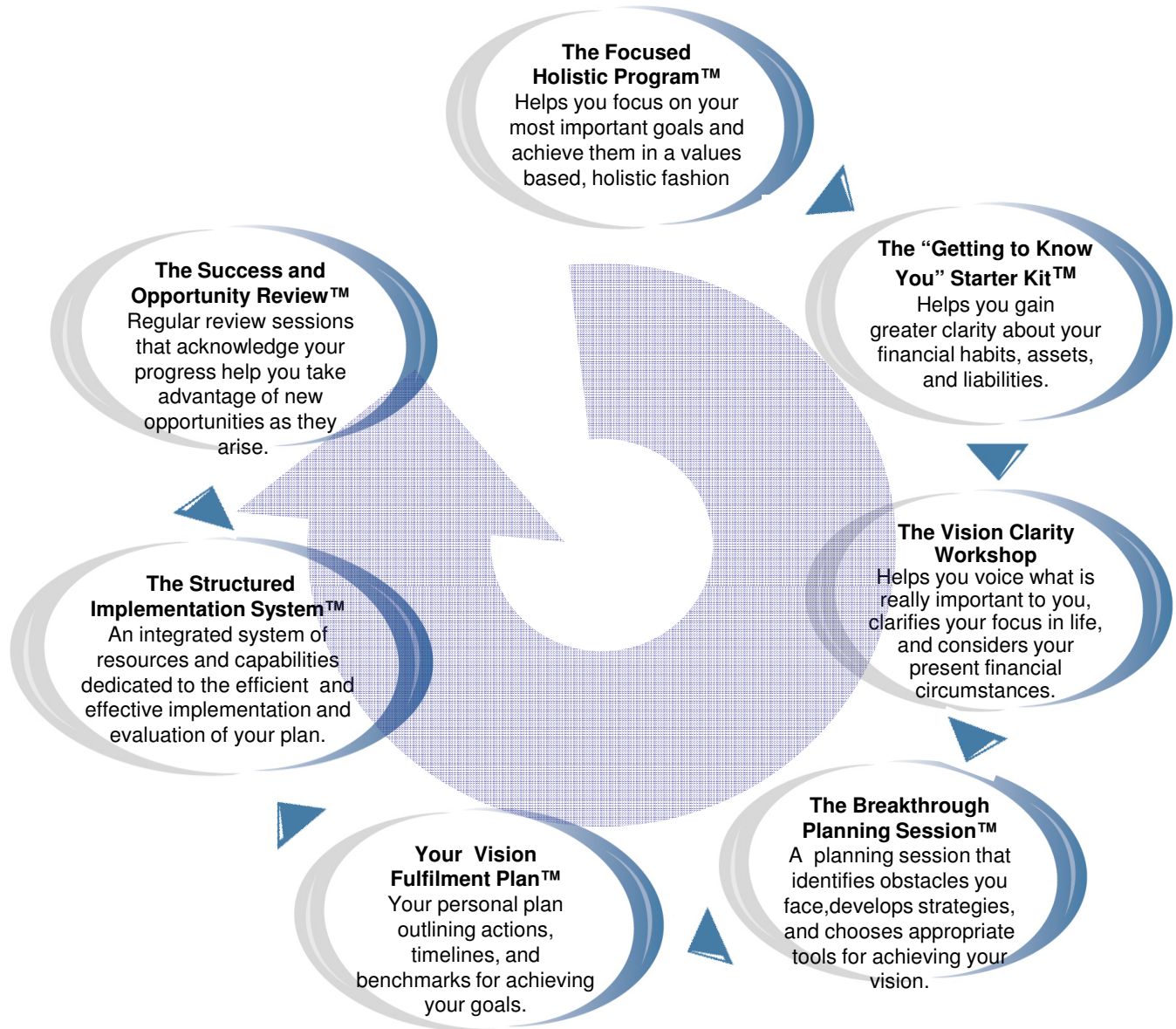
When you have completed the process, you will be focusing on your most important goals and achieving them in a values based, holistic fashion. You will have a clear, powerful vision for the future. Your defined goals will be effectively communicated to your advisors and loved ones. You will be focused 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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