



# The Focused Holistic Approach<sup>TM</sup>

**Assisting You in Making Wise Decisions**

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# The Focused Holistic Approach™

- ▶ The advisors at Hansen's Advisory Services are financial coaches.
- ▶ **Hansen's Advisory Services** created this unique process for individuals, businesses and non-profit organizations called **The Focused Holistic Approach™**.
- ▶ It helps you **focus** on your most important goals and achieve them in a values based, **holistic** fashion.

# 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.

## Program Overview, cont'd

- ▶ 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.

## Program Overview, cont'd

- ▶ We developed this process working with our clients during the past three decades. 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.

## **The Focused Holistic Program™**

Helps you focus on your most important goals and achieve them in a values based, holistic fashion

### **The “Getting to Know You” Starter Kit**

Gain greater clarity about your financial habits, assets, and liabilities.

### **The Vision Clarity Workshop**

Voice what is really important to you, clarifies your focus in life, and considers your present financial circumstances.

### **The Breakthrough Planning Session**

Identify the obstacles you face, develop strategies, and choose appropriate tools for achieving your vision.

### **Your Vision Fulfilment Plan**

A personal plan outlining actions, timelines, and benchmarks for achieving your goals.

### **The Structured Implementation System**

An integrated system of resources and capabilities dedicated to the efficient and effective implementation and evaluation of your plan.

### **The Success and Opportunity Review**

Regular review sessions to acknowledge your progress and help you take advantage of new opportunities as they arise.

# 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.*

## 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.

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.
Do not have clear financial goals.	1	2	3	4	5	6	7	8	9	10	Have clear financial goals.
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.
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.
Do not properly track monthly spending.	1	2	3	4	5	6	7	8	9	10	Monthly spending is properly tracked and managed.
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.
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.
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.
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.
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.
<b>ADD COLUMN TOTALS</b>											<b>YOUR SCORE _____</b>



Contact us for more information about

# The Focused Holistic Approach™



# HANSEN'S

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