

What Is Your New Year's Resolution?

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IN THIS issue

- 01 | What Is Your New Year's Resolution?
- 03 | Member Of The Month - Britt Stouffer
- 04 | Tool Of The Month: The Progress Focuser

1. *Take more vacation time.*
2. *While making more money.*
3. *And maybe join that gym.*

While Lawyers with Purpose is able to help with the first two, you are on your own for number three. If you are looking for something different this year, I have the perfect New Year's resolution for you: Make sure you have an estate plan.

It is your life's work making sure clients have complete, funded, functional estate plans that accomplish their goals. But what about you? Can you rest assured that if something happened to you tomorrow, your loved ones would be able to avoid probate and your stuff would get to whom you wanted, when you wanted, in the manner you wanted?

Imagine sitting in the conference room, confidently going through the vision meeting.

You have gone through the client goal focuser and you finish laying out the different plans, and you are thinking, "This is going great, they need an Enhanced AP-2 and they understand the value of it." And then, they ask you the dreaded question: "Do you have a Trust?" They know instantly if you do not have your own estate planning done.

We have repeatedly heard the statistic that more than half of all Americans age 55-64 do not have Wills. Please do not add to that statistic as an estate planning attorney. Of course we all think we have time to do it later, but what if we don't? It will not be good for business if potential clients heard that you—the estate planning attorney—did not have your affairs in order.

What Is Your New Year's Resolution? (Cont.)



It will instill a sense of credibility when you can honestly tell your clients, "Yes, I have a plan that accomplishes all of my goals."

Besides the typical reasons for completing your estate plan (avoid probate, protect your assets from creditors and predators, protect your beneficiaries, etc.), as attorneys we are in a higher-likelihood-of-being-sued profession. Yes, there is malpractice insurance, but why leave it to chance? Better safe than sorry.

For those of you who have your planning done: excellent. Review it and update it. Make sure it is properly funded.

If you are the owner or co-owner of your law firm, consider business planning and succession planning.

Hopefully you have a little down time around the holidays, and you are able to get your personal planning in order. It is like the oxygen mask on the airplane; help yourself before you help those around you. For our newer members, drafting your personal estate plan is a great first step toward learning the LWP way of drafting documents.

I wish you a happy, healthy, prosperous and most importantly, a prepared New Year!

Brittney Shearin, ESQ
Legal-Technical Attorney

Save the Date
March 25-29, 2019
SHERATON NEW ORLEANS, LA



Enroll Today: Retreat.lawyerswithpurpose.com

*Lawyers With Purpose would like
to recognize **Britt Stouffer** as
DECEMBER 2018 Member of the Month*



What is the greatest success you've had since joining LWP?

Consistently making revenue.

What is your favorite LWP tool?

The Medicaid Qualification Sheet.

How has being part of LWP impacted your team and your practice?

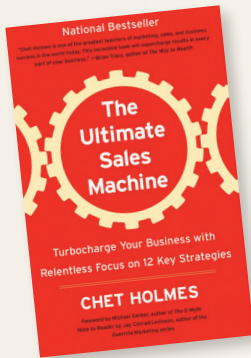
It has given our team more confidence, stability and awareness of how the team functions with LWP visuals and processes.

Share something about yourself that most people don't know about you.

I am an avid hunter.

What is your favorite book and how did it impact your life?

The Ultimate Sales Machine- It has provided good strategies to approach sales on a large scale.



Congratulations to you on your continued success!

TAPER

Twice-Annual Practice Enhancement Retreat

New Orleans, LA

TOOL OF THE MONTH: **The Progress Focuser** | Phil Miner

When you complete a Progress Focuser, you'll find it is a rewarding experience to acknowledge what you have accomplished and that you are taking the proper steps to set up goals to have the future you desire. Start off your new year looking at what you accomplished in 2018, what is adding to your joy, and what you are doing now to have the 2019 you desire!

Part 1: Past

You have to answer the question: Since my last Progress Focuser, what accomplishments gave me confidence in my progress, both professionally and personally? Notice, like many of the LWP tools this is not just about your professional life and professional accomplishments, you need to take time to examine your personal life too. You need balance; do you have it? Also, this tool is not limited, you can measure any time period you'd like. For example, you can measure since I joined LWP, since I hired SmartMarketing or began something new like coaching, attended TAPER, or anything that you would like to connect your progress towards. You start with the past and what you have accomplished instead of living in the "GAP" of where you want to be. We all need to take time to acknowledge our accomplishments! This is one of my favorite tools to measure progress of those I coach, and to see what impact LWP or even what impact I am making on our members.

Part 2: Present

You have to answer the question: What is currently giving me the most excitement, professionally and personally? We always seem to be aware of what's not working and our challenges, but how often are we focusing on what gives us the most excitement and enjoyment in our lives? This is sometimes easily forgotten or unnecessarily sacrificed. This tool will help you see how often you are living within your unique ability and focusing your time on things that provide positive energy. If the majority of our time is doing things we hate or sucking out our energy, then we are at a disadvantage mentally and most likely physically. This could impact your retention rate, your relationships with others, your ability to clearly communicate and be creative. Where is your time and focus, are you focusing on the items that feed your energy level?

Part 3: Present

Next, you have to answer the question: What should I be focusing on now to assure the greatest impact on my future?

It is what we do today, tomorrow, and this week that sets the stage for what our futures will look like. We are faced with decisions every day that will affect our future, so where does your focus need to be now to obtain the future you want? What steps, projects, and tasks are you doing now to build into your future goals? What are you doing now to enhance or build off of the items that are bringing you the most joy? Looking at our progress and the steps we need to be taking, prevents us from remaining on the hamster wheel or being like an ostrich by putting our heads in the sand saying someday we will change this. No, the time and the actions need to be occurring now to get the future you desire.

Part 4: The Future

Look into the future, set a date, and ask yourself: What do I chose to accomplish to have the future I seek? What goals did you set and what results did you achieve for the next time you look at the Progress Focuser to have the future you want? Put yourself in the position that you made it, you accomplished what you wanted to have for the future you desire. What specific things occurred to get you there? Where was your focus that helped you get the prize? If we don't see ourselves having the future we desire, the chances of having that are slim to none. You need to believe in yourself, and believe it is possible. Be clear on the progress you are making and have positive energy. These are keys to having the future you desire!

Part 5: Insights and Takeaways

Ask yourself: What are some of the key takeaways and opportunities from this activity? Did you learn that you hate drafting and need to hire a support team to help with design meetings and drafting; did it help you identify that you need to hire a new team member; did it help point something out in your branding or promise to the market place; or did you have an opportunity to redefine your wholesale relationships; did it cause you to look at how you are spending time with your family? These are just a few of the many insights and takeaways from using this tool. What will your insights be? Find out and complete your Progress Focuser found in the planning section on the member website or talk to one of our coaches or implementation specialists if you are working with one! Remember this is always about moving forward and keeping your eyes on the goal!