



A Personal & Professional Development Company

Advisory Board Exercise

The Advisory Board exercise is designed to help you build an empowering circle of influence. Each of these people will play a unique role on your success journey. I recommend that your advisory board consist of no more than 7 people and no less than 5. In this exercise I am identifying 6 people who will help you create a sense of balance between your personal and professional life.

Life-Business Coach. This person will serve as an objective set of eyes into your life and business and is also someone who will help you develop a strategic plan and hold you accountable for the results you desire. You will meet with your coach at least once a month and in most cases, weekly.

My coach is _____ we have agreed to meet _____ per month.

Financial Advisor. This is the person who guides you financially. In many cases, you will have both an investment advisor and a CPA. In most cases, you will meet with this person(s) quarterly. As you achieve higher levels of success this person(s) will prove to be very valuable.

My Financial Advisor(s) is _____ and _____.
We have agreed to meet _____ per quarter.

A Trusted Friend. This is someone whose objective opinion you value more than anyone else. They know you very well and they can be counted on to give you solid advice. They are someone you can turn to when you are sad or excited and you know that you will be accepted for who you are. This person should feel the same way about you.

My Trusted Friend is _____.
I will meet with them whenever I need a pick up or an objective opinion or just for fun!

A Spiritual Partner. This is someone who shares your spiritual beliefs and can be a good sounding board as you grow your faith. For some this may be a member of the clergy, for others it is someone you attend church with or someone from a spiritual study group. This person will be different for everyone.

My Spiritual Partner is _____.
We will meet _____ per month.

An Industry Peer. This is someone in your industry who you admire and trust. This person has no financial gain from your success but is someone who will provide you with guidance and will serve as a mentor for you. This is someone you will meet with every couple of months or as needed.

My Industry Peer is _____.
I will meet with this person _____ monthly, quarterly.

A Health Advisor. Our health is the foundation of our success. Without high energy levels, we will not be able to maximize our potential. This person(s) may include a nutritional consultant or a personal trainer. Many personal trainers are also certified nutritional consultants. Your health advisor(s) will help you design a health and wellness plan that is right for you.

My Health Advisor(S) is _____ and _____.
I will meet with them _____ per week or month.

This is your personal success team. Choose them wisely and watch your life and business go to the next level!