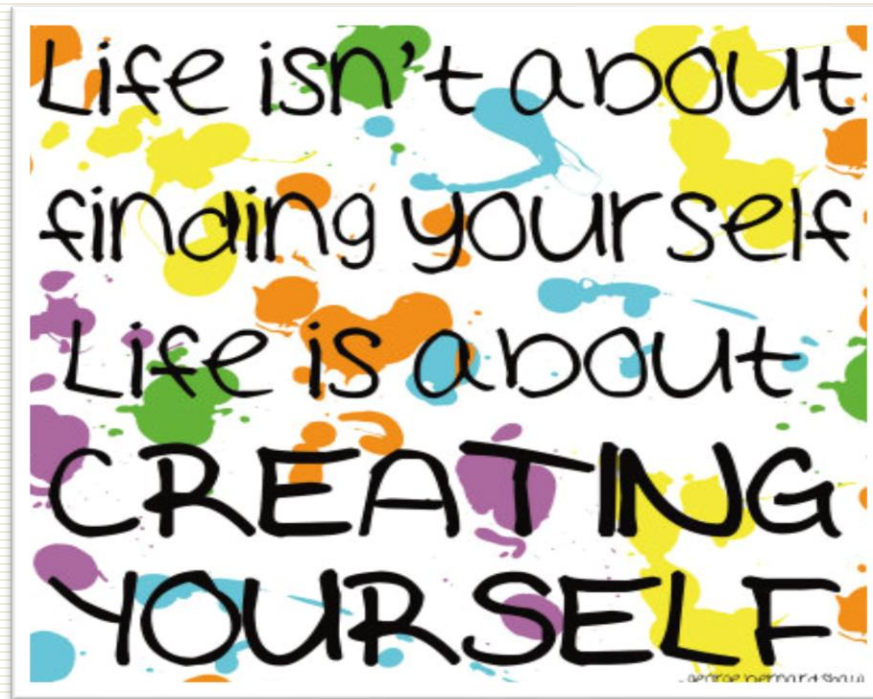


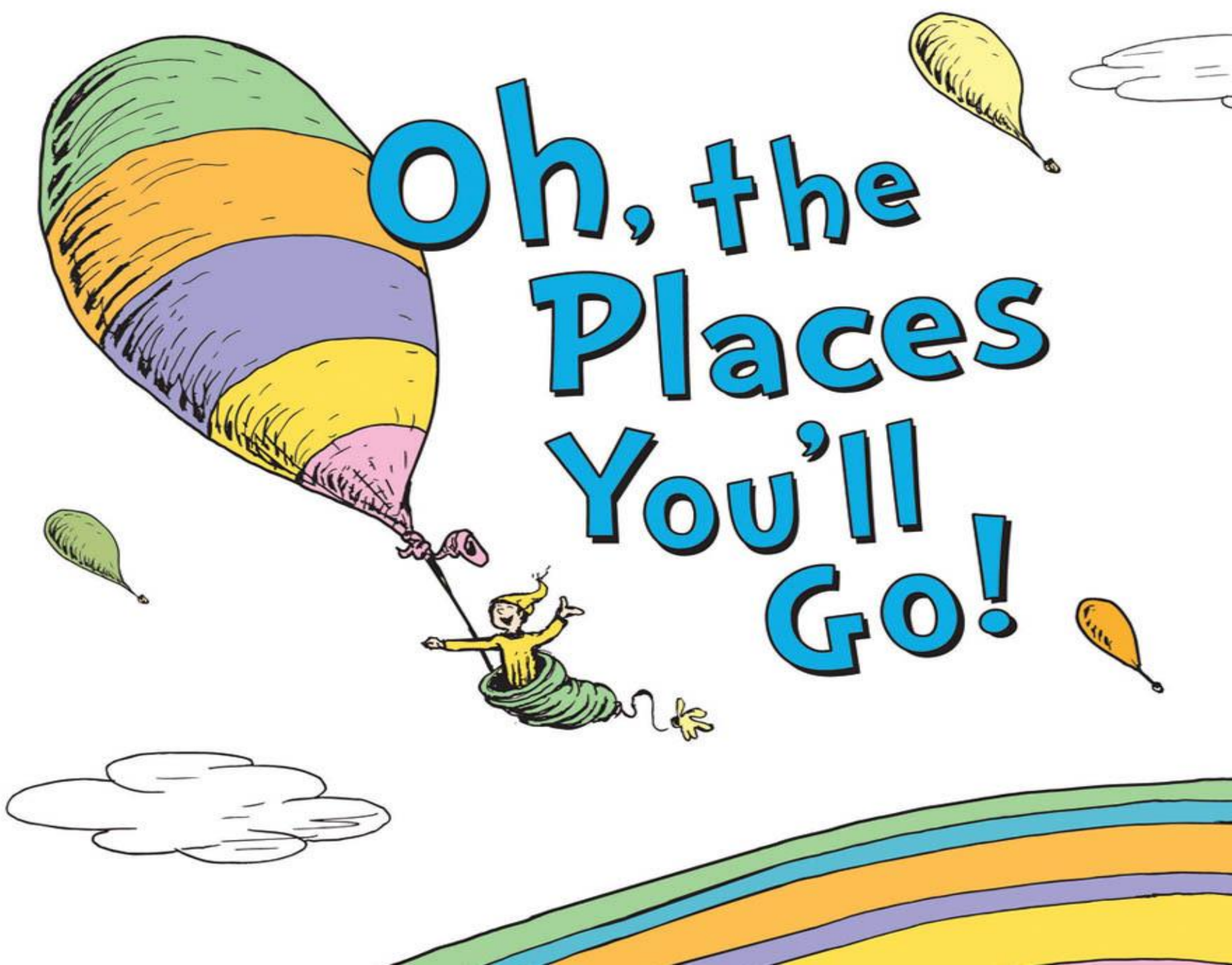
5 Fabulous Fingertip Tools



Freddi Dogterom BHHS CCDP CPT PRP®RRC

Your Enhanced Engagement Specialist

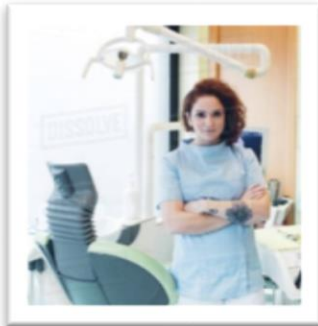
Oh, the
Places
You'll
Go!



Read Current Trends and Issues ...



Current Trends and Issues in Financial Planning May 2019



Google image

Doctor Karen is a 58-year-old dentist with a thriving and busy practise who has followed the expert guidance of her Financial Planner for years. She has put money aside in RRSP's, TFSA's, has a healthy investment portfolio and has resisted investing in horses, Panama condo buildings, gold mines in Nigeria and other "sure thing" financial traps. You are her trusted advisor and you are the one she turns to for advice and guidance. Now she is looking at selling her practise in about 2 years, and "Retiring" – *whatever that means* – and has come to you for help, advice and support! What now?

"Retirement" or the next life phase for our clients requires planning for both money and time, a

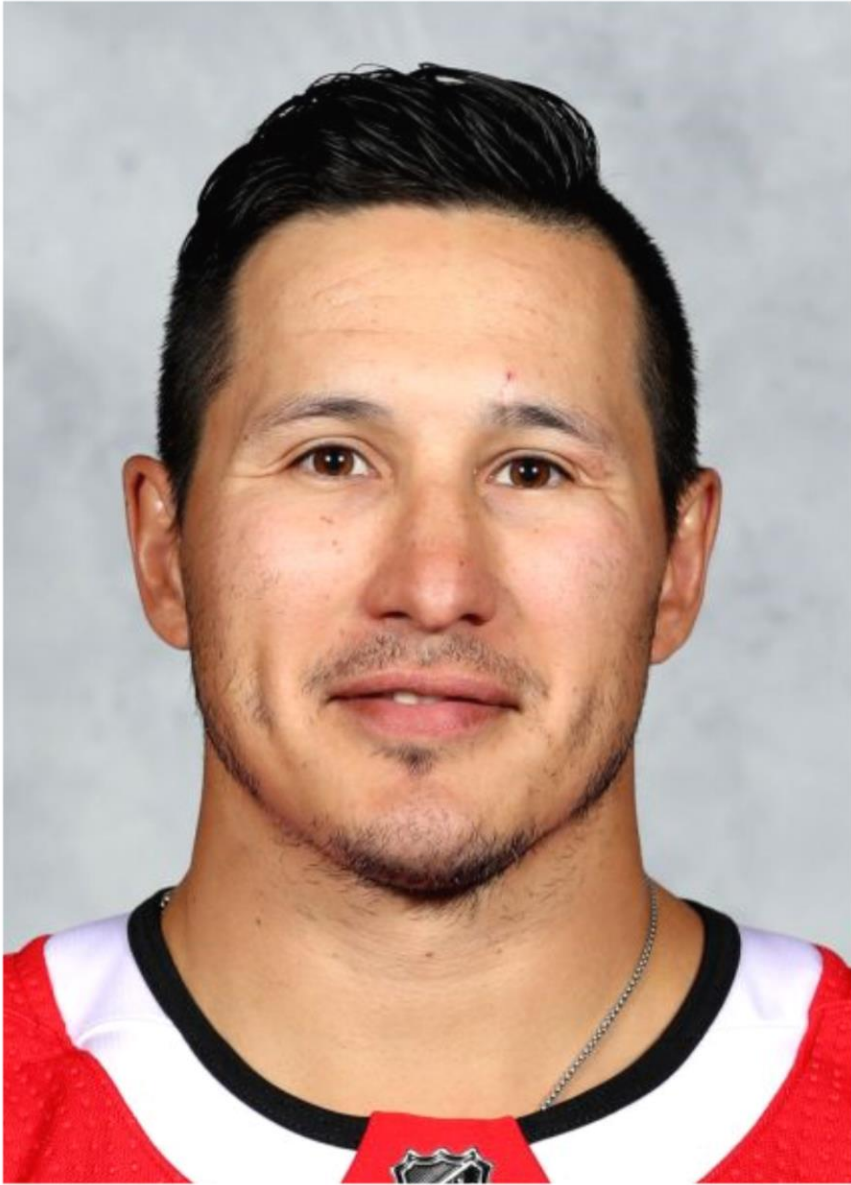


Open Questions



A photograph of a winding gravel path through a lush garden. The path is light-colored and curves through various green plants, including tall grasses and shrubs. In the background, there are several trees, some with dense foliage and others with more sparse leaves. The sky is overcast with soft, grey clouds. The overall scene is peaceful and natural.

The Path of Life



Jordan Tootoo

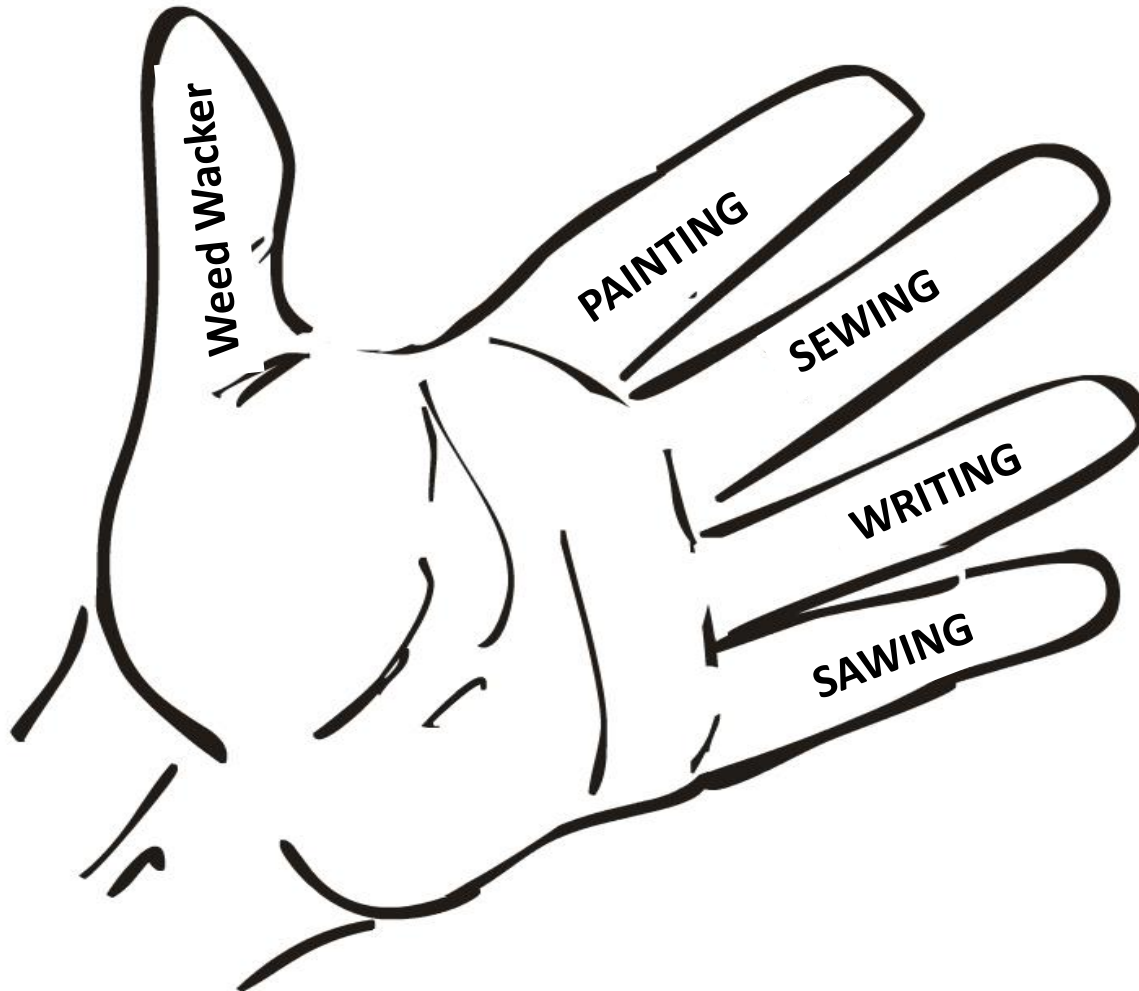


Ethan Bear





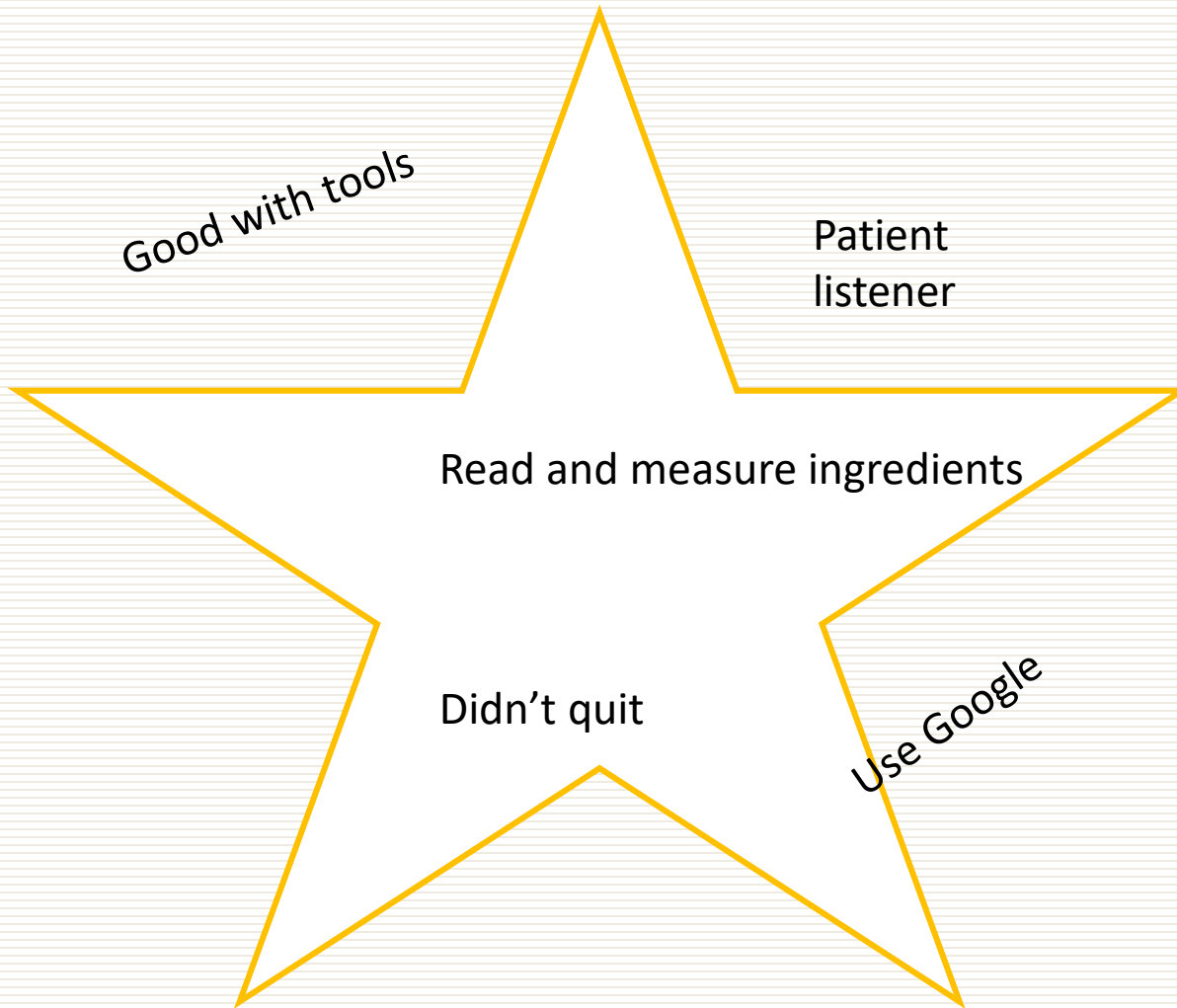
Fingertip Skills



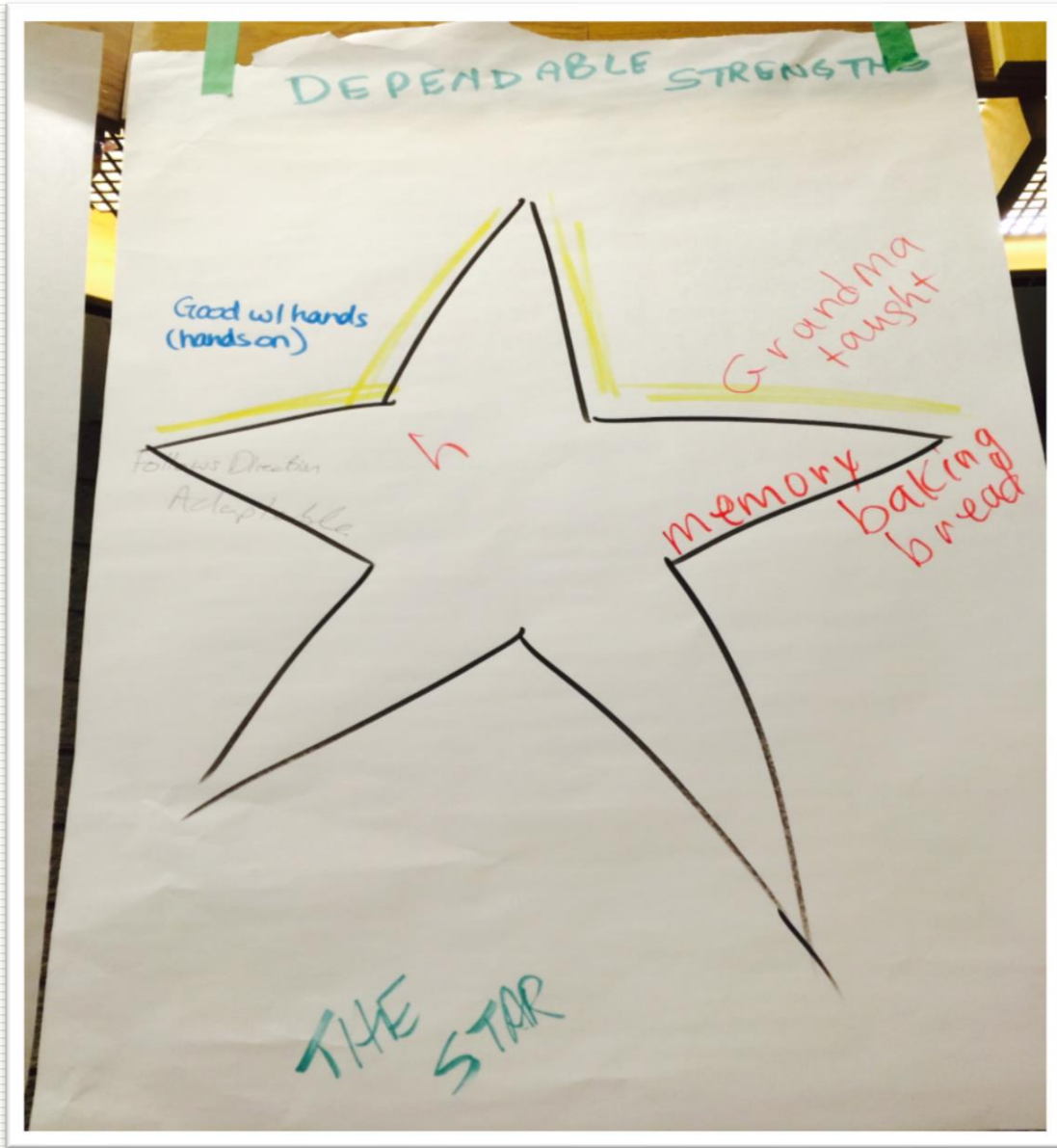
What are your hands good at doing?

1. Hand tools
2. Power tools
3. Catching
4. Throwing
5. Measuring
6. Touching
7. Crafts
8. Sewing
9. Writing
10. Details

My Dependable Strengths



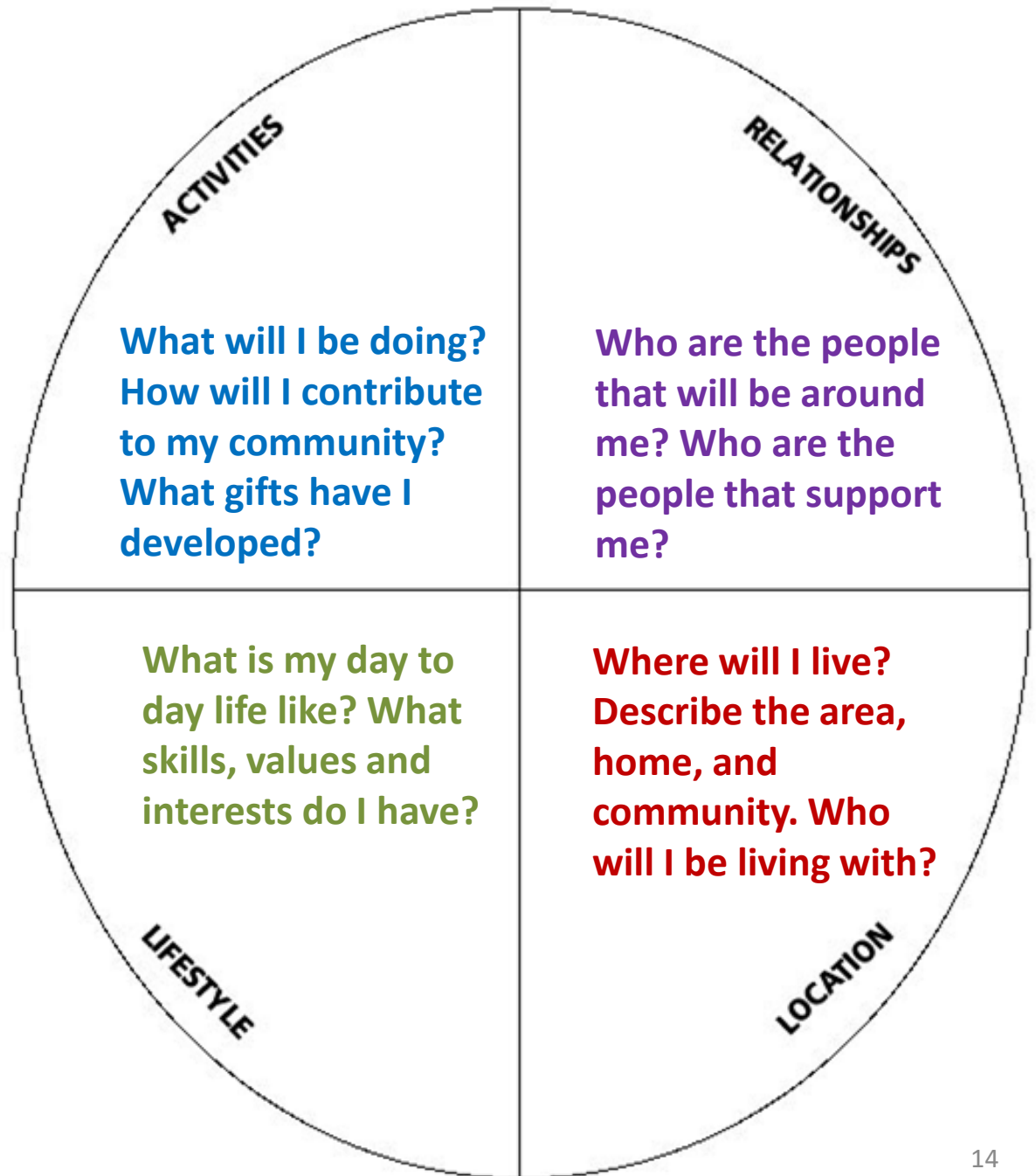
1. Tell about an accomplishment or experience you feel very good about
2. Record the skills that are identified in the story

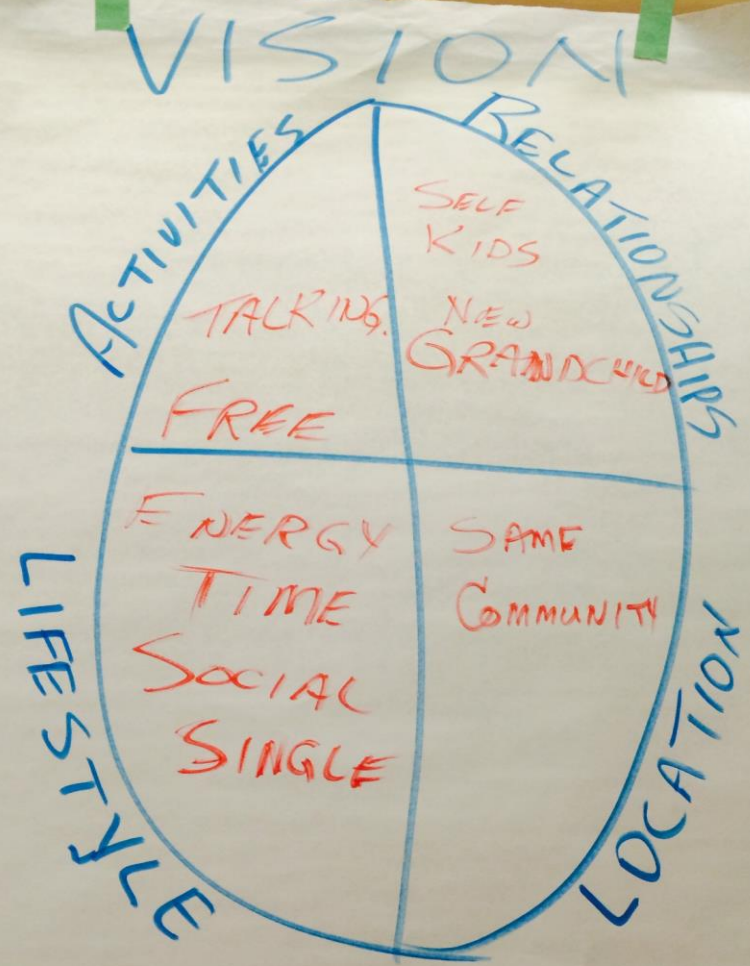


George

My Vision

In the best of all worlds - In the next 5 – 10 years, I want my life to be





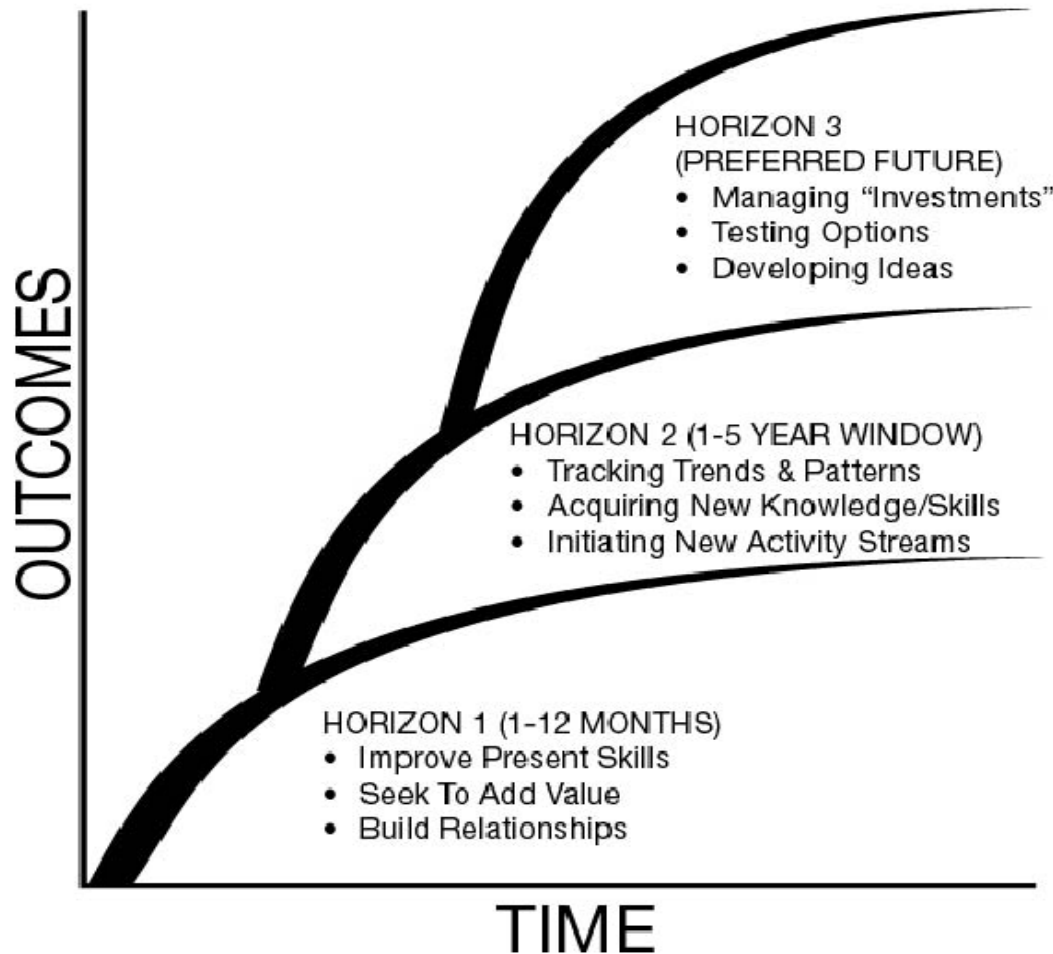
5. YRS
 PASTER EGG

2 YRS.

10 YRS

Goal Setting

CAREER BUILDING ACTIVITIES 3 HORIZONS



NOW
NEXT
FUTURE
PREFERRED FUTURE



FREDDI'S, HEYNDE
FEATHER MAY 21, 2023
8 YRS AUDITION @ VOKE

Outcome

FUTURE

SUPPORTORS #3

NEXT #2

Now #1

10 YRS OPPORTUNITIES - OPEN NIKIE
- BOOK COVER MUSIC TAB
- COMPOSE LYRICS TO ASHLEY'S
5 YRS. HUM
PRACTISE 3-4 X @ week
LEARN TO TUNE SENIOR
VOLUNTEER FOR KIDS
1-12 months
GET A GUITAR
LEARN CHORDS
LISTEN TO GUITAR.
LESSONS

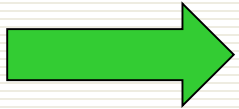
GOAL. PLAY GUITAR

TIME
3 HORIZONS

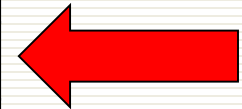
Force Field Analysis

DRIVING YOU FORWARD

HOLDING YOU BACK



DRIVING YOU FORWARD	HOLDING YOU BACK



BONUS

Circle of Support

Type of Support:

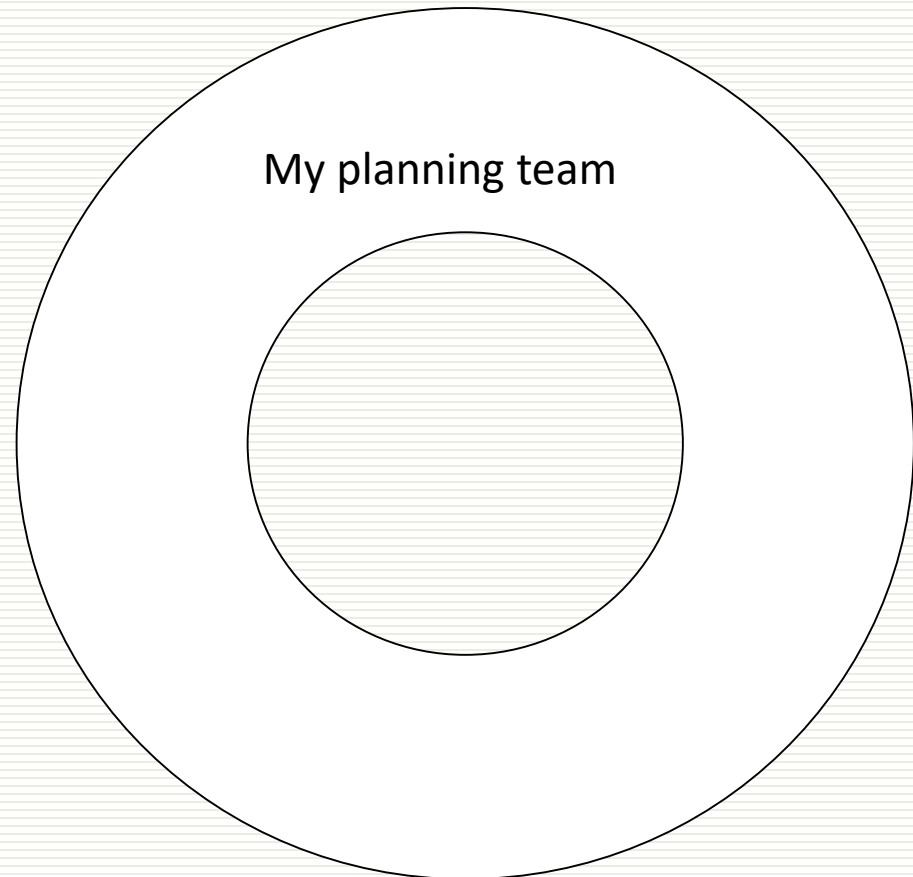
Who can support me?

Financial

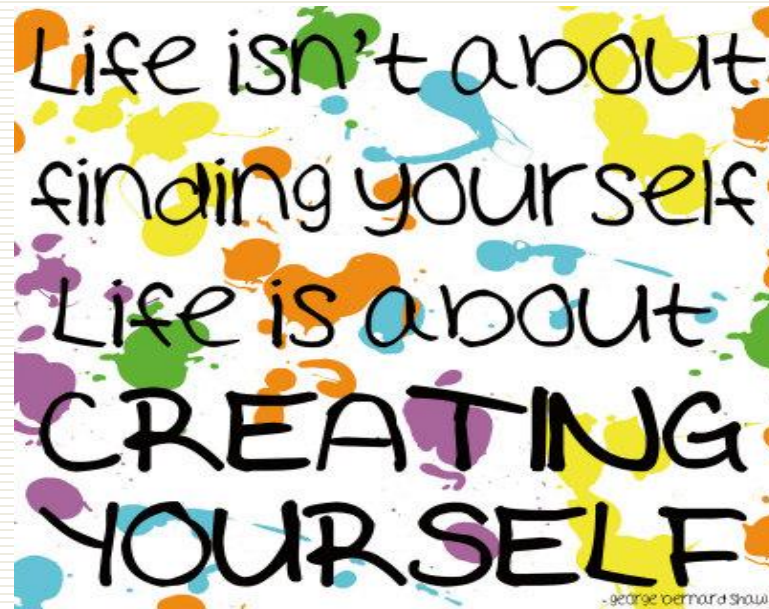
Legal

Emotional

Occupational



5 Fabulous Fingertip Tools



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Freddi! SPEAKS!



Motivate and Inspire

- Dynamic Keynote Presentations

Train Talented Teams

- Increase engagement
- Personalized skill building
- Build your bottom line

Personality Training

- Success from the inside out
- Communication and conflict skills
- Team Building
- Family relationship building

Retirement Planning

- Plan for success
- Explore realistic options
- Personalized approach

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