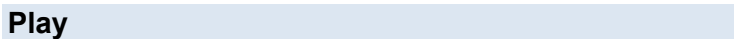



Sample Model Week



	Monday	Tuesday	Wednesday	Thursday	Friday
7:00 AM					
8:00 AM					
9:00 AM					
10:00 AM					
11:00 AM					
12:00 PM					
1:00 PM					
2:00 PM					
3:00 PM					
4:00 PM					
5:00 PM					

Type of Activities:

- Play 
- Plan 
- Perform 



Sample Advisor Model Week

	Monday	Tuesday	Wednesday	Thursday	Friday
7:00 AM	Work Out	Run	Work Out	Run	Work Out
8:00 AM	Review Business Plan, 90 Day Action Plan	Client Visit Preparation	Client Visit Preparation	Client Visit Preparation	Client Visit Follow Up
9:00 AM	Team Meeting	Client Visit	Client Visit	Client Visit	Team Meeting
10:00 AM	Key Team Member 1:1	Client Visit	Client Visit	Client Visit	Team Member 1:1
11:00 AM	Key Team Member 1:1	Client Visit	Team Meeting	Client Visit	Complete remaining ACTION ITEMS for the week
12:00 PM	Lunch	Lunch	COI / Referral Lunch	Lunch	Lunch
1:00 PM	<i>Return Calls/Emails Make Outbound Calls</i>	<i>Return Calls/Emails Make Outbound Calls</i>	<i>Return Calls/Emails Make Outbound Calls</i>	<i>Return Calls/Emails Make Outbound Calls</i>	<i>Return Calls/Emails Make Outbound Calls</i>
2:00 PM	Coaching/Consulting Call	Client Visit	Client Visit	Client Visit	Prepare for Next Week
3:00 PM	Review Marketing Plan, Prospect Pool, Money List	Client Visit	Client Visit	Client Visit	Family Time
4:00 PM	Family Time	Client Visit	Client Visit	Prepare for Marketing Events	
5:00 PM		Family Time	Family Time	Marketing Dinner	Date Night

Type of Activities:

Play	
Plan	
Perform	



Sample Staff Model Week

	Monday	Tuesday	Wednesday	Thursday	Friday
7:00 AM	Work Out	Run	Work Out	Run	Work Out
8:00 AM	Team Meeting Preparation	Daily Preparation Return Call/Emails	Daily Preparation Return Call/Emails	Daily Preparation Return Call/Emails	Client Visit Follow Up
9:00 AM	Team Meeting	Client Visit Preparation	Rollover Follow Up Cash Reports	Insurance Application Follow Up	Team Meeting
10:00 AM	One on One		Client Visit Follow Up	Client Visit Follow Up	Client Visit Follow Up
11:00 AM	Return Calls/Emails Make Outbound Calls	Return Calls/Emails Make Outbound Calls	Team Meeting	Return Calls/Emails Make Outbound Calls	
12:00 PM	Lunch	Lunch	Lunch	Lunch	Lunch
1:00 PM	Client Visit Preparation	Client Visit Follow Up	Client Visit Follow Up	Client Visit Follow Up	Return Calls/Emails Make Outbound Calls
2:00 PM		Complete Financial Plans & Deliverables	Complete Financial Plans & Deliverables	Complete Financial Plans & Deliverables	Client Visit Follow Up
3:00 PM		Complete Financial Plans & Deliverables	Complete Financial Plans & Deliverables	Prospect Communication Touch System	Prepare for Next Week
4:00 PM	Return Calls/Emails Make Outbound Calls	Return Calls/Emails Make Outbound Calls	Return Calls/Emails Make Outbound Calls	Help Prepare for Marketing Events	Family Time
5:00 PM	Family Time	Family Time	Family Time	Family Time	