



THE PERFECT RIA

1: OKR's

Client Services:

- Value Adds
- Beneficiary Report

Firm:

- EBOC
- Cost Cutting
- Staffing
- RPC (Revenue per client)

Travel:

- Calendar
- Conferences
- Family

Family:

- Quality Time
- Attentiveness
- What are you doing for yourself to be better?

2. Energy

- What fuels your energy?
- What takes away from it?

3. Take Aways

- A. What do you want to track? Make it consistent
- B. How do you improve?
- C. Extreme Ownership
- D. Find someone who is doing what you want to do; learn and model from them