

# Business Consulting Services

The financial services industry - specifically Financial Planners, Wealth Advisors and CPA's - are particularly vulnerable deriving 100% of their revenue from the success and integrity of the Corporate and Business Landscape.

Having been in the Financial Services Industry for over 23 years I know the system and how it is set up. I know the strengths and the integrity challenges to building practices and relationships within the planning industry. It is important to understand all aspects of these relationships with transparency if these relationships are to work and be successful.



New approaches with a focus on sustainable and impact investing, offering comprehensive planning services based in integrity, and aligning with teams of individuals offering their specific expertise will be critical for creating a sustainable practice and successfully serving your clients.

Our unique competitive edge is based on the fact that our consulting model utilizes 20 years of studying and utilizing holistic principles and applied "meta" and quantum physics in our work.

This separates us from our competition and allows us to assist you in creating exactly what it is you define to be your goals and objectives. We use your challenges as a way through to your goals not an impediment to them. We are quite aware of the fact that if a practice or business is to succeed in this changing climate the individual as well as the business model must adapt itself to these new frameworks of thought and paradigmatic shifts. Being able to create sustainable businesses going forward will require the integration of a "People Driven" business paradigm that creates what we call a "Prosperity Driven Business Model".

## Consulting & Resources for CPA's, Financial Planners and Business Owners

Core areas that are addressed specific to Planners, CPA's & Financial Professionals:

How to Build a Sustainable "People Driven" CPA/Financial Planning Practice, Align with other Disciplines to Offer Comprehensive Succession Planning Services & Sustainable Investments

Integrating Financial Planning Services: Evaluating the Different Model's Strengths, Challenges, Transparency & The Emergent Business Assessment<sup>©</sup>

Creating a Sustainable CPA Practice: Building Additional Revenue Streams, Mechanisms for Exit Strategies & Succession Planning

## Creating a Sustainable Business Model: The 7 Critical Fundamentals

The Business model must align to The 7 Critical Fundamentals: Integrity/Mindset, Change/New Metrics, Employee/Self Development, Connection/Social Responsibility, Truth/Communication, Community Signature, Energy & Profitability Consciousness.

**Executive and Leadership Coaching - "Network Leadership"**  
**Emotional Intelligence & Belief Systems (consciousness factors)**  
 how that affects your bottom line.

**Managing Stress and Promoting Physiological Coherence:** Explores how stress in the workplace directly affects your bottom line and how to use cutting-edge technology to assist employers and employees in reducing stress in the workplace. Stress has been well documented to both increase the risk of disease and to negatively impact work performance. High levels of emotional distress have been found to be among the most costly health problems to employers in terms of claim costs, absenteeism, disability, customer satisfaction and failure to meet productivity standards.

