



How can leadership play a key role in converting your plan to results?

Consider for a moment that many of our clients, before they became our clients, faced some sort of challenges in trying to get counsel around their financial affairs. Generally, the topic was one of stress and obligation rather than inspiration and excitement. At Cedar Brook, we find this ironic: think of all the sweat equity and tenacity that goes into your life's work. Certainly the planning for what to do with the results of it all should be infused with pride of ownership – a chance to think big about your future.

We believe the missing link can be remedied by one of our core tenants: The Leadership Lever. It's our fundamental premise that, for any endeavor to be successful, it must have leadership at its core. A plan is simply a set of intentions. If a leather binder signifies you're "done" with planning, then we're all in for a big surprise: it's akin to making a wish and blowing out the candles.

In our model, the plan itself is the beginning of a life-long journey with leadership at its core. Leadership gives your intentions a focal point and a common purpose – a methodology for converting your intentions to actions and your actions to outcomes.

The Leadership
Lever™

The plan itself is driven by your dreams and your value system, your family history and its biggest future. This raw material is cultivated into a cohesive game plan of solutions and strategies that feel like an extension of you on your best and proudest days.

Now, if we reflect back to the process we used to create your plan, we start to see how the entire experience has the potential to be incredibly expansive and fulfilling, absent the stress and fatigue of past planning experiences. In our model, you are the central figure in your own planning. The plan itself is driven by your dreams and your value system, your family history and its biggest future. This raw material is cultivated into a cohesive game plan of solutions and strategies that feel like an extension of you on your best and proudest days.

Then The Leadership Lever kicks into high gear. We mirror your commitment to your plan with our commitment to playing a leadership role from here forward. Together we walk the path of converting your dreams to achievements. We help you remember to keep dreaming bigger and bigger along the way. It's not the "annual review" model of days gone by, it's a relationship model: one with leadership at its core.

As always, feel free to reach out to us with comments or questions on this or other planning concepts.



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