



## Wealth Planning Report

# The Power of Purpose from Connectedness

Most people would like to know how to live more fulfilling lives, foster happier families, create and manage stronger teams, and have happier clients and customers. Can you imagine what life would be like where those outcomes could become a reality?

Some good news: One way to pursue those results has substantial research to show how it is possible. The key is *connectedness*—a concept pioneered and championed by world-renowned psychiatrist Dr. Ned Hallowell. Connectedness, as Hallowell defines it, is the sense of being part of something larger than yourself that you believe makes an impact. Connectedness can be a big driver of success in your social life, your work and (for entrepreneurs) your company.

Superficially, “connectedness” seems like a “soft” concept, but it has strong scientific roots.

- The warmth of personal relationships during your life has the greatest positive impact on lifetime satisfaction, according to the Grant Study.
- Isolated people face a 50 percent greater risk of premature death than those who have strong social connections, according to the T.H. Chan School of Public Health.
- Lack of connections with others creates a stress that can damage the immune system and lead to more sickness, according to a study out of the University of California, Los Angeles.

### KEY WAYS TO CONNECT

Dr. Hallowell suggests that there are three primary elements of connectedness to concentrate on.

#### Connect with yourself

Do you find that you focus more on your negative traits and shortcomings than on those positive characteristics you possess and display to people around you? This is common with most successful people—however, too much of a negative focus can sap your life of its joy at work and at home.

Try taking the following steps:

- Make a list of 12 adjectives that describe you well—maybe use a personality test. Next, draw a rectangle around the one that you would most like to change. Then, draw circles around the three that you are particularly proud. Finally, write down one thing you did or accomplished in the past year that makes you feel especially proud of yourself.
- Write one or two sentences to a favorite teacher or coach from the past, telling them how much they helped you. Just bringing that person to mind will help create a sense of connection and writing will strengthen your ability to feel and show appreciation. Consider doing the same exercise every quarter with someone who impacted your life. (This can make a surprising impact on *the recipient's* life, as some have reported.)

Ultimately, what you write isn't as important as simply completing these exercises. The actions themselves increase the inner connectedness with yourself, and how you view who you are.

People report that after completing these exercises they gain greater perspective about what really matters, and that after sharing their feelings with others who helped them in the past, they felt joyful afterward. The procedure also helped them better prioritize their ambitions and future plans.

#### Connect with your team

Your “team” could be the people you supervise at work, or could be those you partner with in social, church, political or charitable group settings. Connected teams consist of members who can trust each other deeply and who can communicate with openness and candor—and who are not concerned with secrets and backstabbing.

Even connected teams have conflicts. Pushback and creative tension among teams are signs that the team members are engaged and can speak their minds freely. Connected teams have an opportunity mindset—a belief that, no matter what, you can acquire the skills and find the resources you need to achieve big things working together.

If you are in a position of power or an authority on your team, lead the way. For example, encourage team members to give you feedback on your performance—if they see you making mistakes. If they think something can be done a better way, tell them to let you know!

Here are two ways to start building team connectedness:

- Write one sentence describing your team. In five bullet points, describe the leading strengths and weaknesses of your team. Include three strengths and two weaknesses, so that you focus more on the positive than the negative of your team members.
- Write one congratulatory sentence to your team and share it with them. It might be something like “This last quarter was especially challenging, but you all put in the extra time we needed in order to hit our goal, and I really appreciate it!”

People who did these exercises reported that doing so helped remind them of all the positive attributes they have as a team and to stop overfocusing on occasional situational negativity.

## Connect with your clients

Not surprisingly, building deep connections with clients can generate huge payoffs. The more you can connect with clients and relate to them well, the more successful you will be at establishing trust and convincing them to take even difficult actions you need them to choose.

Building deep connections starts when you truly listen to your clients. *Connection cannot happen without paying attention.* Your job is to get rid of the devices and distractions that block you from connecting with clients. During client interactions, close the door. Turn off the computer screen. Slow down. For some people, wear a headset so that you can focus on the conversation. Walk around, if need be, to not look at the computer and desk distractions.

## Powerful and free

Perhaps the greatest thing about the concept of connectedness is that taking constructive actions to become more connected—leading to more purpose in your own life—is that those steps are not only powerful but free. You just need to decide to take action to be more connected, and then persistently make the effort to regularly reach out using the strategies that we highlighted above.

This is an executive summary of our wealth management ebook. For a complimentary copy of our complete report, please contact us.



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Paul founded Professional Financial Strategies, Inc. as one of the first fiduciary planning firms in 1993 that now specializes in retirement and wealth management for affluent and aspiring families. Paul is a personal chief financial officer who acts in the best interest of clients. He brings together a distinctive management process and a network of specialists for making informed decisions for structured investing, secure income, mitigating taxes, protecting assets, and preserving wealth for family and purposeful causes.

Mr. Hill received a BA with distinction from the University of Rochester and later an MBA in finance from its Simon School of Business. He earned an MS in financial services from The American College along with his Chartered Financial Consultant and Retirement Income Certified Professional designations, and then received an MS in financial planning from the College for Financial Planning (now at the University of Phoenix). The College for Financial Planning appointed him as adjunct faculty, and he has taught at St. John Fisher College. Who's Who presented Paul with the Albert Nelson Marquis Lifetime Achievement Award, the Humanitarian Award, and featured him with others in *The Wall Street Journal* and other publications.

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