



Wealth Planning Report

Six Keys to Optimizing Your Health, Longevity and Well-Being

It's pretty safe to say that everyone wants to experience optimal health. It's also pretty safe to say that most of us know some steps we should be taking to enjoy those benefits—but that we too often don't bother. Bad habits are hard to change.

Enter Shawn Wells, a leading nutritional biochemist and dietitian. His book, *The Energy Formula*, lays out six critical steps that can potentially help you gain focus, be more productive and unleash your full potential. He's even framed his advice in a way that makes it easier to remember and implement:

- Experiment
- Nutrition
- Exercise
- Routine
- Growth
- Your Tribe

Experiment

Until you systematically track something scientifically, it's very difficult to know how you are doing and whether any changes you make are providing positive results. So begin with a series of lab tests to assess your mitochondria. Wells explains that nearly every disease and perhaps even aging itself is tied to mitochondrial health and function. Additionally, Wells recommends two lab tests that can help you get a strong general baseline to gauge future progress:

- Vitamin D, which not only supports the immune system and prevents infection but also is related to many other body functions.
- Lipoprotein (a), which is correlated to cardiovascular disease risk and is superior to other heart-related tests such as those for HDL, LDL and total cholesterol.

Next, use a “wearable” that tracks your sleep quality, heart rate variability and other important data points. The best of these devices will not only provide you a baseline of important metrics but can also track the duration and quality of your sleep. The result: cumulative data and specific readouts of exactly where you currently stand.

FIVE MORE ASPECTS OF ENERGY

Nutrition

Keep things simple here. The best diet is one focused on whole foods with as little processing and as few additives as possible. Armed with this foundational view, your own bio-individuality and preferences can help point to which kind of whole-foods-based lifestyle diet is best for you. Three options to consider are:

- The Ketogenesis (or “keto”) diet, which is 0–10 percent carbohydrates, 20–25 percent protein, and 65–75 percent fats.
- The Mediterranean diet, which is 10 percent meats and sweets, 10 percent poultry and eggs, 10 percent seafood, and 70 percent vegetables and fats.
- The Paleolithic (or “paleo”) diet, which is 15 percent nuts and berries, 15 percent fruits with a low glycemic index (those that don't spike blood sugar), 30 percent meat and seafood, and 40 percent vegetables.

Finally, Wells is a proponent of the supplement *berberine*, which helps lower glucose levels.

Exercise

Wells notes that each additional hour of daily sitting increases all-cause mortality rates by about 2 percent. One solution is movement breaks and “exercise snacks.” The idea is that if you have only one hour a day to dedicate to movement and exercise, you are better off breaking that up into 12 five-minute segments than doing it all at once. You can walk or run inside or outside, do air squats, do planks, climb stairs, bounce on a mini-trampoline, jump rope or do anything else that is fun and at least moderately raises your heart rate.

Routine

Seek to align your body with your circadian rhythm and do whatever else is necessary to get sufficient sleep. Health, healing, exercise, mood, performance, disease resistance and longevity itself have all been shown to be directly related to sleep patterns.

The second routine focus is starting our days right to set ourselves up for success—not stagnation. Wells recommends

waking up 30 minutes earlier than you normally do currently so you can take your time and engage in the following types of activities:

- Take in bright light early in the day.
- Meditate, or do a mindfulness or breathwork practice—such as deep breathing through the nose with slow exhales.
- Stretch and take a short walk.
- Hydrate and eat a high-quality breakfast.

Growth

Growth refers to having a growth mindset—whether it is with regard to your body, your mind, your business or career, or your inner emotional and spiritual life. For example, to get your body to the next step, one very powerful and increasingly popular tool is intermittent fasting.

Likewise, for developing our inner lives, Wells suggests considering the Japanese concept of “*ikigai*,” which translates to “reason for being”—or, as Wells puts it, your “reason to jump out of bed in the morning.” A sense of purpose and a growth mindset go hand in hand. To be fully energized, we

have to discover for ourselves what works at every level of our bio-individuality, from the physical to the spiritual.

Your Tribe

A 75-year Harvard study looked at many factors (such as money, race and occupation) to see what was most important for healthy aging. Ultimately, the most critical factor for leading a healthy, happy and long life is the quality of our close relationships.

The key, however, is not necessarily having a lot of friends or even being in a long-term relationship. What really matters is whether there are others in your life with whom you can be authentic and vulnerable. Knowing we can rely on and trust others relaxes the nervous system, helps keep the brain healthy, and reduces both physical and emotional pain we feel.

Conclusion

Some of this advice may be new or surprising, and some you may have already known and put in practice. But by putting it together in a coordinated way that connects the dots, you may find it easier to turn all those insights into action steps that bring you closer to living your best life for as long as possible.

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. in 1993 as one of the first fiduciary planning firms that specializes in retirement and wealth management for affluent and aspiring families. Paul is a personal chief financial officer acting in best interest of clients. He brings together a proven process and a network of specialists for making informed decisions for systematic strategies, 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 taught at St. John Fisher College. Who’s Who presented Paul with the Albert Nelson Marquis Lifetime Achievement Award, and featured him with others in *The Wall Street Journal* and other publications.

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