

# THE TAKE CONTROL WORKBOOK

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Turn your biggest career goals into a step-by-step action plan.



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**Journal Prompt: If you had 46 days off this summer, what would you do with your time?**

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## The Take Control Framework

This workbook is designed to guide you through the Take Control framework. This framework is the proven 7-step framework that, when applied, will help you to map out your path to achieving and surpassing your biggest financial advisor career goals.

The word '**CONTROL**' is the acronym for this seven-step process. Here's are the steps and the Breakdown of the word 'CONTROL':

- C** LEAR GOALS
- O** WNSHIP
- N** UMBERS
- T** ACTICS
- R** IGH-FIT CLIENTS
- O** BSESSION
- L** IFE



## Clear Goals Exercise: The \$100,000 Breakdown

Take a goal you have right now and break it down into numbers.

- ✓ What's your income target for this year? (Example: \$100,000)

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- ✓ How many clients do you need to serve to reach it?

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- ✓ How many meetings per month/week does that require?

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- ✓ How many calls/emails per day will get you those meetings?

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### 💡 **The Key Takeaway: Goals Should Be Specific and Tied to Meaning**

Goals that are tied to a deep personal reason—and broken into tangible actions—are the ones you actually achieve



## Ownership Exercise: The Ownership Shift

Think of one challenge in your business right now. Instead of blaming external factors, reframe it. For example:

- ✗ "Clients aren't buying because the market is slow."
- ✓ "I need to refine my approach, target the right clients, or improve my sales pitch"
  
- ✗ "I don't have time to prospect"
- ✓ "I need to restructure my calendar and eliminate low-value activities"

Now, write down a few of your own thoughts, ideas or frames that shift once you choose to take full ownership of the outcomes of your actions.

✗ **Challenge/Problem:**  
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✓ **Ownership Shift:**  
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✗ **Challenge/Problem:**  
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✓ **Ownership Shift:**  
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### 💡 **The Key Takeaway: Control = Power**

The second you own everything—your wins, your losses, your next move—you unlock unlimited potential.



## Know Your Numbers Exercise: Your Business Scorecard

Use Excel, the Notes app on your phone, or any space where you are most likely to get in and record these details on a regular basis.

Track the following:

**Revenue Breakdown** – Where is your income coming from? Which products/clients generate the most?

**Client Acquisition Cost (CAC)** – How much does it cost you (time + money) to bring in a new client?

**Conversion Rates** – How many client meetings turn into actual sales?

**Time Per Client** – Are certain clients taking too much time for too little return?

**Marketing ROI** – Which lead sources give you the best-paying clients?

**At the end of each week, review these numbers and answer:**

What's working?

What needs fixing?

What will I double down on next week?

### 💡 **The Key Takeaway: Master Your Numbers, Master Your Growth**

Successful advisors don't guess—they know. The difference between struggling advisors and MDRT qualifiers is that the latter can tell you exactly what numbers drive their success.



## Tactics: The Sales Process Audit Exercise

1. Write down the exact steps of your sales process—from prospecting to closing.

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2. Identify 1 step that needs improvement. (Ex: Weak follow-up? No clear offer?)

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### 3. Commit to one tactical improvement this week.

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**💡 The Key Takeaway: Success is a Result of Small, Repeatable Actions**

The right tactics, executed consistently, will take you further than talent or intelligence ever could.



## **Right-Fit Clients Exercise: The Client Filter**

**1. List your 5 favorite clients. What do they have in common?**

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**2. List 5 clients who drain your time. What's different?**

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### 3. Define the exact criteria for your ideal client.

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Going forward, only take clients who fit this profile, or at least start to ensure that 1 in every 3 clients at the minimum fits this bill perfectly. Slowly, get more aligned towards a Right-Fit Clients Only model.

**💡 The Key Takeaway: The Right Clients Make Your Business Easy**

Choose your clients wisely. Your business should serve you—not the other way around.



## Obsession Exercise: The Commitment Letter

Write yourself a commitment letter:

“ I commit to mastering my craft. I will dedicate time every day to improving my skills. I will push past resistance and discomfort because my success depends on it.”

You can use these words, edit them, or craft your own version from scratch. This is your commitment to excellence, your reminder that even when nobody is watching, your promise to yourself still holds.

**Write your commitment letter here:**

A large gray rectangular area containing ten horizontal dashed lines for writing a commitment letter.

**Sign it. Keep it visible. Read it every day.**

**💡 The Key Takeaway: The Most Successful People Are the Most Committed**

Winners don't "try." They go all in.



## **Life Exercise: The Life Design Audit**

**1. If you took 46 days off starting tomorrow, what would break?**

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**2. What would need to change so you could step away without stress?**

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**3. Write down one major shift you will make this year to bring your work-life balance closer to your ideal.**

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**💡 The Key Takeaway:** Success is Personal—Define It for Yourself

- YOU define what success looks like.
- YOU define what balance looks like.
- And you can absolutely design your business and life to fit those definitions.

Your career should fuel your life, not consume it. The sooner you start designing with intention, the sooner you'll have the freedom to live on your terms.



## Join The 'Take C.O.N.T.R.O.L' Challenge

Here's your challenge. Write down (and then you can publicly commit to):

### One system you will implement this week

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### One task you will delegate immediately

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### One habit you will adopt to improve energy & efficiency

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**NOW, TIME TO GO AND MAKE IT HAPPEN! REMEMBER: YOU ARE IN CONTROL.**



# Notes and Takeaways

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