

Executive Dis-order and our **FIVE** Step Remedy



EXECUTIVE
Disorder
executing clarity

What is Executive Dis-order?

By definition, Executive Dis-order is a widespread issue that commonly affects time-poor executives. If left unaddressed, there can be serious consequences for personal financial and legal administrative matters. These usually relate to Executive Share Schemes (ESS), investments and superannuation, tax and debt management, property as well as estate planning and family law issues.



The impacts

Since 2000, we've worked with dozens of executives who have sought our assistance and a remedy for impacts that many executives will immediately recognise.

They include:

- A sense of **not being on top of your finances** or feelings of **not having enough to show for your hard work** and career to date.
- A frustrating, and sometimes debilitating sense of **wanting to bring order** to your affairs but not having enough time to deal with work and life to actually conquer your personal administration.
- **Losing sleep** as one or more particularly vexing issues keep you awake at night.
- Apart from the usual money, tax and debt worries, issues relating to **your career** including what's next in your progression, or how to jump start a potential stall.
- You're also concerned about **your relationships** as you wonder whether those closest to you are happy.

- Your **mind seems full of noise** 24/7, even during holidays.
- In the back of your mind, you know **avoidance isn't the solution**. Understandably, you feel it inappropriate to discuss these issues with family and colleagues.
- As accomplished as you are in your field, and despite your financial acumen, **you have not been able to translate opportunities** into personal prosperity. In short, you have no yardstick for **measuring your personal success**.

In our experience, executives working in pressure environments constantly grapple with these issues.

While quick fixes or financial and legal compromises are unacceptable in your professional life, all too often they characterise your private affairs. Here we describe a process and support system that has been developed specifically for high-earning, time-poor executives with complex personal administration to create order from their executive dis-order.

The remedy

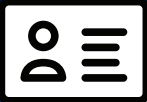
Executive Dis-order is common, and it's difficult to overcome alone.

However, with the right support, taking control of your financial, legal and other matters that contribute to your personal administration it is possible to overcome dis-order.

Our remedy is founded on executives helping executives, understanding what matters most and using five clear steps to achieve outcomes that are right for you:

- Step 1: DEVELOP** your Personal Strategic Plan (PSP)
- Step 2: ASSEMBLE** your professional advice team
- Step 3: EXECUTE** your PSP
- Step 4: REVIEW** your progress at 6 months
- Step 5: MEASURE** your outcomes at 12 months (ongoing)





1: DEVELOP your Personal Strategic Plan

Developing your Personal Strategic Plan (PSP) is akin to completing a business SWOT analysis. Identifying strengths, weaknesses, opportunities and threats to your personal circumstances is an essential first step that establishes a starting point from which to measure progress and set targets for your future personal prosperity.

Our key diagnostic tools include our 5-Minute Financial Health Check and About You questionnaire, which together enable us to provide a succinct one-page Mindmap of your personal affairs.

We will examine where you are now and what needs to be done to achieve your personal prosperity.

This includes considering your tax and legal position, arrangements for managing your Executive Share Scheme (ESS), relationship and family issues.



2: ASSEMBLE your professional advice team

Assembling and co-ordinating your professional team is when the rubber hits the road. Your adviser, acting as your personal CEO, will assemble and brief your professional advice team.

Your advice team may comprise advisers with whom you currently work, along with others selected from our professional network. These advisers bring specialist skills and experience relevant to your particular needs and the complexities unique to your circumstances as identified in your Personal Strategic Plan (PSP).

Working together, your adviser and advice team formulates integrated solutions that strive to deliver seamless outcomes. Time efficiencies and access to specialised expertise are the key benefits of this approach.

Our clients regularly tell us, having an adviser who acts as a personal CEO and central coordinator, relieves the time-consuming task of 're-telling' multiple and unrelated advisers of their often-complex circumstances.





3: EXECUTE

your personal strategic plan

Once you have reviewed our recommendations, and you formalise your agreement, we begin executing projects necessary for achieving stated goals as outlined in your Personal Strategic Plan (PSP).

Led by your adviser, we will attend to your personal financial and legal administration, liaise with each of your advice team professionals, establish workflows and ensure all tasks are completed.

Key benefits for executives include handing over the time-consuming tasks of administering your ESS. We'll take charge of the often-complex responsibility of your ESS vesting schedule and establish the amount of tax you need to pay, when it's due and how to best manage tax payments in consideration of your personal cashflow and structures. We will also take charge of your other tax matters.

Your advice team will work together to create properly integrated tax solutions across matters that will include superannuation, debt, shares, property investments, personal insurances and other matters such as tax residency if you are posted overseas or you've recently returned home.

Our clients often describe an overwhelming sense of freedom and lightening of the load. This is because they know our team will be in regular contact while attending to their personal administration ensuring that it will not only get done, but it will be done on time.



4: REVIEW

your progress at 6 months

A lot will happen in our first six months working together. Accountability is an important aspect of our model. In addition to regular communication from your adviser and advice team, a formal progress meeting will be scheduled six months from commencement.

During this meeting, outcomes already achieved will be discussed and we will also ask a key question: "Has anything changed?"

It's a simple request that can have considerable impacts. Changes happen all the time and they directly affect your financial and legal life.

The birth of a child or passing of a parent, career advancement or role redundancy, buying or selling property, health matters affecting you or those close to you...regardless of how great or seemingly inconsequential, changes affect planned outcomes.

Familiar with your current state of affairs, structures and ownership, we make adjustments as necessary which may include amending financial, legal and tax strategies.

Our clients regularly comment on having peace of mind as they review the evidence of tasks completed on their behalf. These are often tasks that have been in need of attention for months, sometimes years, that can be struck off their mental list for good.

mm 5: MEASURE

your outcomes at 12 months (ongoing)

The adage, what you can measure you can manage, is particularly true of personal financial and legal administrative matters.

Right from the beginning of our engagement, we implement checks and measures that ensure agreed tasks are completed and outcomes are reported.

While our six-month progress meeting presents early achievements and identifies any adjustments or changes in strategy, our 12-month meeting focusses on measuring outcomes and looking to the future.

In preparation for this meeting, your adviser and advice team place a magnifying glass over your Personal Strategic Plan (PSP) and the outcomes achieved to date.

Collaboratively, the team reviews each part individually, and then in context of the whole.

Following your progress meeting, your adviser follows a planned and structured approach that includes compiling a report that will be discussed with you. This involves revisiting your Personal Strategic Plan (PSP), considering outcomes so far, discussing any additional

recommendations provided by your advice team, and again asking: "Has anything changed?"

It's at this point, you will be in a position to agree that you are on track to achieving your Personal Strategic Plan (PSP) or understand further changes are needed.

At Executive Strategies, we're here for the long haul to help you achieve personal prosperity.

In our experience, clients who continue on with our advice team support and participate in ongoing six and 12-month progress reviews, achieve their goals sooner with better outcomes, and experience tangible differences in their lives.

Our clients tell us that progress meetings provide them with clarity which include a concise snapshot of their current and projected financial affairs. Of even greater value, they say completion of previously 'difficult-to-get-to' tasks affords them the confidence to enjoy their current and future day to day lifestyle.

The **benefits**

The benefits are highly subjective to individual needs. However, achieving a properly integrated financial plan that is inclusive of the legal, tax and financial management matters specific to your individual circumstances is the key benefit of our approach for helping you achieve your personal prosperity goals.

Further, as we do the heavy lifting through our collaborative professional advice team approach, we alleviate much of the time duress that can adversely affect relationships, hinder health, well-being and workplace performance.



About us

Executive Strategies is a specialised information hub that provides access to expert professional support.

Its purpose is to inform and provide access for executives who are affected by Executive Dis-order.

Executive Dis-order is a common reality for many executives in areas of Health and Biotechnologies, Pharmaceuticals, Construction, Technology, Mining & Resources and Technology businesses, who lack the time to attend to important personal financial and legal administrative matters.

Executive Strategies was borne of Resources Unearthed. Founded in 2013, Resources Unearthed provides specialised professional and personal support for executives, professionals and business owners in the mining and resources sector.

The tens of thousands of Resources Unearthed subscribers who regularly access quality information and expertise is testimony to the need for, and success of, this model.



Co-founders Brett Cribb, James Marshall and Irma Bantjes with New Business Manager, Madeline Dagge

As a sister entity, Executive Strategies aims to emulate the Resources Unearthed approach and deliver information and insight relevant for executives in industries we've identified as in need of reliable and specialised professional support.

What our clients say

"...an exceptional level of service that was **prompt, professional and targeted** to my specific needs."

"...**considerable knowledge** surrounding structures and technical expertise that translates to an **excellent understanding of financial planning**..."

"...**diligence and efficiency** mean any information I need (as the legal advisor) is not only received quickly and accurately, but is presented in a manner that is easy to understand."

"...pragmatic yet effective advice has seen **acceleration of our savings** with negligible impact on our lifestyle or short-term plans."

"we received unfortunate health news 6 months ago to which **our customised suite of crisis and income protection insurances responded in full**, removing the burden of financial stress and allowing us to focus on getting well."

"We value our regular reviews and having a relationship built on trust... **this enables us to concentrate on our priorities in life** and doing the things we are good at."

"...the initial work presented a big picture of our situation. This was the **first time anyone had ever really understood our position enough** to be able to present a succinct picture of our total position **on one page**..."



Contact Us:

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