Transcription details:

|  |  |
| --- | --- |
| Host: | Bill Coppel, First Clearing Chief Client Growth Officer |
| Guest: | Dr. Carolyn McClanahan, founder and director of financial planning at Life Planning Partners |

Transcription results:

|  |  |
| --- | --- |
| DR. CAROLYN MCCLANAHAN | Well, the number one thing I tell people over and over is, you have to take care of yourself first before you take care of anybody else to be able to do it well. And so an advisor to me needs to look inside and say, "Where am I happy, where am I not happy with my practice?" And parsing out what it is that they want to do and what brings them joy. And it may be for them that they need to make a change in how they're doing their practice. Maybe they need to do like I did and you know the first thing I did was hire out the things I didn't enjoy doing. And then once you have that joy in your life and you're feeling good about what you're doing, that passion really shows through to the people you have to work with. That includes your co-workers, includes your clients, and when they see that you're having the joy and that you're enthusiastic about what you're doing, that's going to attract all sorts of goodness to you to help keep you better and keep you moving forward in a great direction so you that you're happy with your life. |