



THE DISTELFINK – Taking Stock

January 25, 2010

I confess. I've always been one to reflect, and also to anticipate. I like to set goals, and then after a period of time, see if I have accomplished them. Since starting my own practice, I think I have become even more prone to this behavior, and I'm not sure that is always a good thing. But it is what it is, and I strongly suspect that many of you are like this too. There are those who believe, "Intention creates reality." So if we set goals, direct our energy towards making them happen, perhaps they will.

During the quiet, final days of December I spent some time thinking about what I'd accomplished in 2009. I also considered what I had hoped might happen during the year versus what actually did. Last January I was pushing hard to make a website for my business a reality, never imagining that I would also create a newsletter like the Distelfink to share my thoughts and ideas with a broader audience. I debated whether I would be able to bring on a full-time person to help me with administrative work and entering data into clients' Financial Directories. I decided not yet. I dreamed about making new contacts, learning about new offerings, and becoming more knowledgeable to better serve my current and future clients. And I made progress on all those fronts. Throughout the period, I fretted about revenues. How would I earn more, did I have the right business model, would it work in the face of one of the worst financial market meltdowns of my generation? Thankfully it has, so far. And as we progress through January 2010, I am inspired by the promise of what this year could hold.

What are your hopes, dreams, goals for the next twelve months? How will you go about achieving them? I am happy to be back at the keyboard after my hiatus during the holidays, and I pray the writing muse accompanies me throughout the year as I continue to write for the Distelfink, and perhaps others who believe this style of educational and approachable financial writing could appeal to their clients and referral sources. I would love the opportunity to work with more small business owners like me, who value a sharp sounding board for their ideas, and someone to keep the various components of their financial lives on track. And I truly hope that I can find a couple more multi-generational families who will engage me to be their financial generalist, their 40,000 foot adviser to guide them through the complexities of the financial decisions they face. Along the way, I want to smile, I want to propose solutions that others might not have thought of, and I want to experience the contentment of knowing that I made my clients feel empowered by getting their financial lives more in order. And that they didn't have to do it alone.

I think that's the key to what I do many times. I make doing the thing that we all know we should do (but rarely want to do) something we can now check off the list. I would like to help those of you who aspire to be more financially organized and settled this year. I promise you, it is a marvelous feeling of accomplishment. Or perhaps you have a friend, work colleague, or even client of your own for whom I could make a difference. Allow me this, my commercial for the first quarter, as I again ask for your help to sustain my business. Next week I will describe some of the specific ways I helped clients in 2009, and not just by keeping their investments on track to

enjoy the wonderful stock market rally that finally took hold in March. I found many conventional ways to add value, and some quite unusual ones as well. Stay tuned...

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