



GROWTH & SCALE

HOW TO IDENTIFY (AND FOCUS ON) THE WORK THAT GIVES YOU ENERGY



PRAIRIEVIEW
WEALTH PARTNERS



SCORE YOUR DAY

Would you enjoy RIA ownership more if you could only do the work that gives you energy?

In this worksheet, we'll help you identify all the tasks you're doing right now—and see how much more enjoyable each could be if you passed off the work you don't enjoy to someone else who can execute it at your high standards.

We'll get you started with a few tasks in the Front Office, Middle Office, and Back Office. As you fill in additional tasks, score each on a scale from 1 - 5.

A score of 1 means the task sucks energy from you, a score of 5 means you'd love to do it all day.

Keep an eye on anything that's a 3 or lower as an opportunity to outsource so you can improve your daily experience as an RIA owner.

FRONT OFFICE



Write additional tasks beneath our starter list and rank each on a scale of 1 - 5.

Task

Score

Client Experience

—

Marketing

—

—

—

—

—

—

—

MIDDLE OFFICE



Write additional tasks beneath our starter list and rank each on a scale of 1 - 5.

Task	Score
New Applications	—
Data Entry	—
Asset Transfers	—
	—
	—
	—
	—
	—

BACK OFFICE



Write additional tasks beneath our starter list and rank each on a scale of 1 - 5.

Task	Score
Trading	—
Account Maintenance	—
Compliance	—
	—
	—
	—
	—
	—

Need Help with the Tasks You Don't Love? Let Us Help.

We can help take the headache out of your middle and back office work.

You can focus your energy and time on the parts of your business that energize you, and we'll handle all the necessary work that has to be done, but isn't your passion.

We specialize in these areas:

- Financial Planning
- New Business Setup
- Client Service and Support
- Investment Management

Services provided through Focus Forward. Visit gofocusforward.com for additional information.

