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BALANCE - PLAN - RESULT

The Inspirational Tipping Point MDRT Presentation Transcription by Simon Reilly

Welcome to The Inspirational Tipping Point Presentation. It is an honor to speak at the Million Dollar Round Table.

First seek to understand. When there is judgement there can be no understanding. When there is defense there can be no understanding. When there is doubt there can be no understanding. When there is fear there can be no understanding

Everyone in this room is successful; at the same time we understand that there is always another level of success.

The purpose of this presentation is to:

- Help you to meet and exceed your goals, identify your strengths and roadblocks.
- Help you to understand that 10% of success is about How and What to do and 90% of success is about Why.
- Help you to create a bigger Values-based vision, improve leadership, time management and delegation, and from this strong foundation increase your production.
- Explain the missing links that are preventing you from understanding your next level of success.
- Offer you some missing links, and they are understanding the difference between inspiration and motivation, and understanding the difference between Values and Unmet Needs.

You already know that in order to be successful you need to have a:

- strong five-year vision
- business plan
- time management system
- team
- marketing strategies putting you out as a recognized expert to a niche market or two
- attract high net worth clients

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- strong consultative sales process to help your clients discover what's important to your clients to help them make a decision based on their Values & Reasons and not your Needs & Reasons so that cases don't fall apart.

The question I have for you is, Why are you not doing the How and the What for you to become successful?

The answer is ...

Success isn't about How and What to do, because if it were true everyone in this room would be 100% successful because you can get the How and What to do in relationship to vision, planning, time management, teambuilding, marketing and sales, for free on the Internet.

Success has everything to do with Why.

Understanding both Why and Why not.

Think about it. I'd like to ask you a private question that you can answer to yourself. Without raising your hand, again this is a private question and being able to answer this question isn't about looking good in front of this audience. It's a private question and answer.

On January 1, 2015 how many of you started the year with a written five-year vision and business plan?

I am talking about written, the power of the written word. Not in your head, not written on a restaurant napkin, a written five-year vision and business plan.

Experts agree that success is certain when you write down your vision, your business plan and your goals and when advisors are surveyed there is an extraordinary number that do not have a written five-year vision and business plan.

I'm here to talk about Why and Why not.

Why has far more to do with Being than Doing.

Being comes from Why you're doing what you're doing versus doing and doing and doing without having a clue as to Why you're doing what you're doing.

Being comes from understanding the difference between inspiration and motivation. To inspire is to influence, to move or guide from within. Being also comes from understanding the difference between Values and Unmet Needs. Values are Why you do What and How you do what you do. They're the DNA of fulfillment.

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You may say to yourself, what has this got to do with being a financial advisor? Everything. Let me offer you this example from when I spoke at an Advocis, The Financial Advisors Association of Canada, Professional Development Day in April 2010.

An MDRT Member client of mine stood up in front of 140 advisors and said, Simon showed me that I have the Unmet Need of Worthiness.

As a result of working with Simon I closed a \$1 million dollar case.

My client said, some of you might think a \$1 million case isn't that big of a deal.

My client then said, that was the commission.

My client said that Simon helped me to understand that the Unmet Need of Worthiness was generating the Negative Emotions of doubt and uncertainty and Negative Beliefs like, I'm not making as much money as higher net worth clients so how can I work with them.

Let me ask you, what story are you addicted to that is fueled by Unmet Needs, Negative Emotions and Negative Beliefs?

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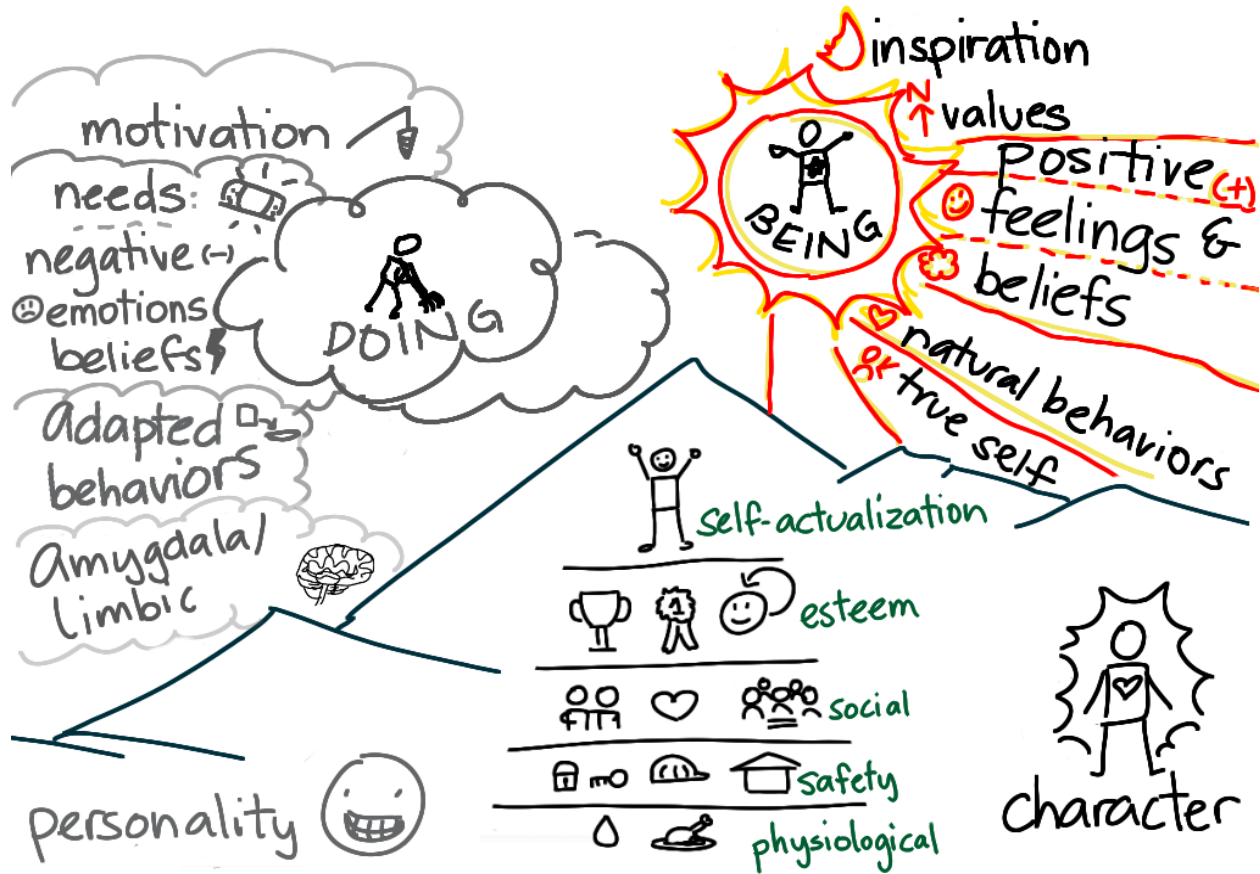
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Over the past 35 years, here's what I've learned. People don't know the difference between inspiration and motivation. To inspire is to influence move or guide from within. Motivation is based upon need, fear and desire. Clearly need and fear are unsustainable. You might say well desire that sounds pretty good. Well the Latin root word for desire is desiderare. It means moving away from a star. You're already a star, what do you need to move away from? The other thing people don't understand is the difference between Values and Unmet Needs. And this is epidemic. Values are Why you do How and What you do. They're the DNA of fulfillment and fulfillment is a deep Soul oriented experience that you feel when you are expressing your Values, and when you're living your Values you will be experiencing Positive Beliefs and Positive Feelings at the same time.

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So an example: my Values are teaching wisdom, sense, understanding, community and the feelings that I would experience when I feel those Values in a sense of confidence, conviction, certainty, and the belief that I would like to share with you today that members of this audience will wake up and understand their Values on a much deeper level to be able to create consistent inspiration going forward. But Values are like turtles; they only come out when it's safe. They will be dominated by Unmet Needs until they are met and Unmet Needs must be met. When an Unmet Need is met we can be our true selves. The thing about an Unmet Need is, we are mistaken that the person, or possession, or a position can meet the need. Unmet Need examples are safety, recognition, power, control, worthiness and these Unmet Needs generate limiting beliefs and limiting emotions.

An example: let's take the context of a business setting. A businessperson is thinking about asking a client for a referral. They have the Unmet Need of approval. The limiting beliefs are, I might look like a sales person if I ask for a referral. I might make a mistake. I might get rejected. The client might turn around and say no and the emotions that are tied to that are fear and anxiety and it becomes a self-fulfilling prophecy. Frankly the client will pick up the vibe of the Unmet Needs and the likelihood of a referral happening are nil.

It is absolutely essential that you understand your Values so you can stay inspired because the success you're trying to achieve will be unsustainable. This also ties into the laws of attraction. The laws of attraction are absolute. I've already explained it, I'll just review it again. In fact this is actually the missing link as to why the law of attraction is not working for some people. Simply put the law of attraction is, know your Values. They will help you to generate Positive Beliefs and Positive Feelings but the fly in the ointment is the Unmet Need.

Putting it into a business context, what's one of the biggest problems that businesspeople have? Time management, and they've been to every time management seminar known to humankind and they have the book on the shelf to prove it but they're still struggling. I contend it is the need of safety, and that's generating I have too much to do. I'll never get it all done. Anxiety and fear once again and it becomes a self-fulfilling prophecy because there is an addiction tied into the Unmet Needs and they can't seem to understand how to get out of it.

This also ties back to Abraham Maslow's hierarchy of needs theory from 1955, about the time the TV set came on stream, the Unmet Needs meeting device, now we all have one. Level one is physiological need, level two is safety, level three is social, level four is esteem, and level five is self-actualization. Let me ask you this, who is the Self? And I contend that you are a Being. You are something more infinite. You are not your body. You were not your mind but you are certainly not the little walnut-sized amygdala, ego or limbic brain, emotional brain, Seth Godin calls it the lizard brain, that controls us with Unmet Needs. You are something far more significant.

Now Unmet Needs are not all bad. They're a blessing and a curse. Imagine a grain of sand. It goes into the oyster, after twenty five years a beautiful pearl is created but the problem is there's a grain of sand, there's an irritant in the middle of the pearl.

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I'll put it into a business context. I deal with business people and there's an expression, it's called the Plateauing Out syndrome. Clients say to me, I don't know what's going on. I have three cars, I have three houses, I have three resort homes, I have three of everything, they have three families, they have three wives, and they're saying, is this all there is? I thought I was going to turn around and feel differently, and I thought I was going to be a hell of a lot happier. There is nothing wrong. There's an absence of understanding. While these Unmet Needs are a blessing in the beginning, they actually turn out to be a curse. There's an expression... I mentioned the amygdala, ego, or limbic brain, the emotional brain, Seth Goden called it the lizard brain, it doesn't know what it wants but it is always wanting, and it is always judging. It is always judging. It is never ever satisfied.

Now, the point I want to make about family. How many of us had our needs met in the family of origin? Some did; some didn't. Is it the family's responsibility? Well yeah, if they're conscious of it but they are not to blame. They are not to blame. You cannot give something that you do not have and it is up to us not to judge the family, to understand that they did their absolute best but as adults we just have to understand that it's normal to run Unmet Needs of safety and approval and recognition. How do you get a need met? It's very simple. You could do it with this affirmation. Next time you're outside, you could close your eyes and just walk out in the sunshine and feel the radiant warmth of the sun on your body and you could say thank goodness I'm alive and remind yourself because the amygdala is about three years old and again it's confused and it's always wanting.

Just like the Universe, you are always expanding. The question is, what are you expanding? Are you consciously expanding your Values, Positive Feelings and Positive Beliefs or are you creating a never ending black hole fueled by Unmet Needs, Negative Emotions and Negative Beliefs?

Balance Plan Reward Scorecard - Handout

So how do you understand what is preventing you from creating a bigger Values-based vision, leadership, time management and delegation and increasing your production?

Clearly this is about understanding your:

- Values that drive Positive Feelings and Positive Beliefs
- Unmet Needs that drive Negative Emotions and Negative Beliefs

Please refer to The Balance Plan Reward Scorecard and rate yourself on a scale of 1 to 10, one being low and 10 being high, in the 10 areas of your business.

How Do You Score on The Balance Plan Reward Scorecard?

To clearly understand your current situation, complete *The Balance Plan Reward Scorecard*™. Rate your reactions to each pair of phrases. Decide where you score on the scale from 1 to 10. Add up your total from each column.

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	Financial Survivor												Financial Advisor
1.	I lack focus.	1	2	3	4	5	6	7	8	9	10		I follow a written 5-year vision and business plan.
2.	I am not making as much money as I would like.	1	2	3	4	5	6	7	8	9	10		I am fully satisfied with the amount of money I am making.
3.	I have to get myself pumped when I am selling.	1	2	3	4	5	6	7	8	9	10		I feel naturally excited about my work and I enjoy the selling process.
4.	I feel I am not getting enough referrals.	1	2	3	4	5	6	7	8	9	10		I am getting many great, qualified referrals.
5.	I feel that I am working too hard, with too many unqualified or C and D clients.	1	2	3	4	5	6	7	8	9	10		I am getting many new high-quality clients.
6.	I try to serve anyone and everyone.	1	2	3	4	5	6	7	8	9	10		I have branded my business and I am focused on a niche market.
7.	I do too many favors and I sell too many products.	1	2	3	4	5	6	7	8	9	10		I am focused on profitable products and services.
8.	I feel completely overwhelmed doing things I don't like to do.	1	2	3	4	5	6	7	8	9	10		I do what I love to do and have a hiring system to delegate everything else.
9.	I have a lot of conflict in my business relationships.	1	2	3	4	5	6	7	8	9	10		I manage my business relationships extremely well.
10.	I beat myself up when things don't go right and I have lost my enthusiasm for my business.	1	2	3	4	5	6	7	8	9	10		I always celebrate my successes and learn from my setbacks. I am achieving my true potential as an advisor.
	ADD COLUMN TOTALS												YOUR SCORE _____

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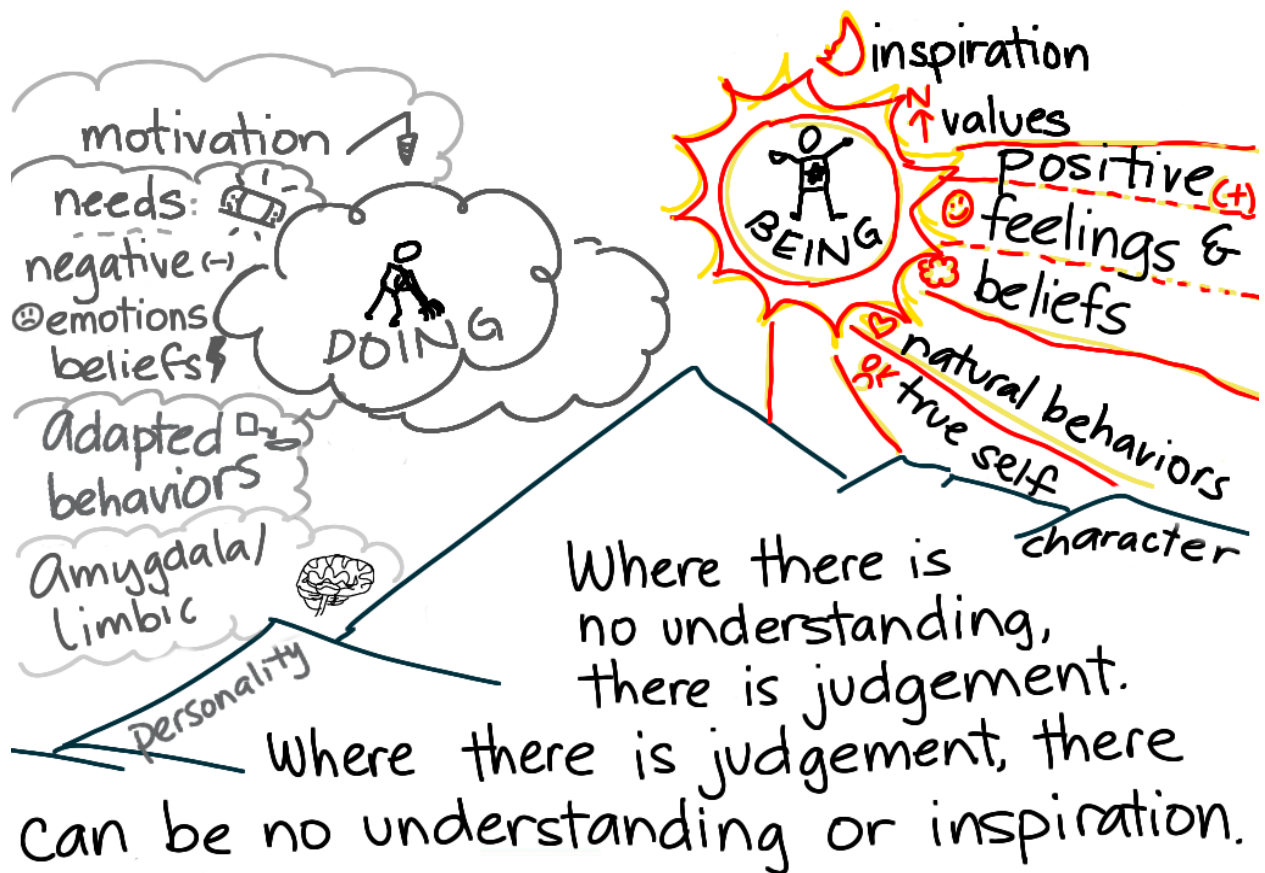
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This should give you an indication of where your Unmet Needs, Negative Emotions and Negative Beliefs are interfering with your Values, business and life.

I'll leave you with this quote: When there's no understanding there is judgement and when there's judgement there can be no understanding or inspiration. The definition of courage is living your Values.

Thank you very much. Enjoy the rest of your day.



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