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JULY 2017



CLUE U.I.N.

Your Ultimate Resource In Life Brokerage

OUR MISSION: BUILD A FRAMEWORK

How We Helped Scott Craft a Plan for Success



I have a friend, Scott, whom I've known for about 10 years. He's married, has three kids, and works as an entrepreneur. He makes a good living, but he seeks more financial freedom to help his business grow. Having been raised in a low-income situation, he also wants his kids to have a financially secure life.

Scott needed a clearer picture of his financial future, but it was hard for him to wrap his head around it. Many of us have that same problem. How can I grow my business and continue to make more money? Will I have enough for today, tomorrow, and retirement? In Scott's case, he wondered when that fateful day of retirement could come. Perhaps you wonder the same thing.

A while back, Scott and I went to lunch and discussed these questions. I've been in the financial industry for 15 years. I know from experience that most investment plans lose money, trigger high tax rates, and don't generate enough income to retire when you want to — a universal driving force for every working man and woman. We all want to go to bed at night with the feeling that we're heading in the right direction for retirement.

That universal desire is what compelled us to adopt a new mantra: Retire When You Want. As you can see, we've renamed this

newsletter after it. We feel it best sums up our mission here at Unified Insurance Network.

We worked together to eliminate Scott's fear of retirement, and there were specific steps to take care of immediately. As his guide, I first encouraged him to put funds away in case of an accident, which he did. If he hadn't done this, he would have been exposed to unforeseen risks.

From there, we built a framework for his financial future. Now, Scott has the direction, clarity, confidence, and freedom to eventually retire when he wants to.

here's a reason I'm sharing Scott's story. In past issues of this newsletter, I wrote about myself and my story. I'll continue to share topics like that from time to time, because I think it's good for you to get to know us if we work together. But for the most part, I want this newsletter to focus on concepts and ideas to help you grow your business.

We'll share success stories, ideas, and concepts that can help get your clients retire closer to their wanted timeline. Know that we're here to listen and help you find the solutions to help your clients achieve financial freedom that comes with having the right financial framework, like we did for Scott.

Wishing you a warm and happy summer,

- Justin

Business App of the Month *ActiveCampaign*

Gone are the days when you could sit back and wait for patients to come to you. Today, the competition is fierce for great patients, and you need solutions that can help you convert leads into patients.

If this sounds like marketing, that's because it is. And at the forefront of good marketing is email. Even after all the latest talk about virtual reality and AI, email continues to be the biggest bang for your buck. There are a lot of different email marketing platforms that are worth trying, but one solid choice to consider is ActiveCampaign.

Here's a solution that lets you build an email list, create marketing campaigns, and send emails — without having to know any programming languages. The popular term is WYSIWYG — what you see is what you get.

If you get visitors to your website, you can associate the clicking of a link with an action and have emails automatically sent based on those actions. With a WordPress site, you can use the free plugin to easily customize which data is included in your email capture form.

Are there other email marketing solutions that offer more features? Absolutely. But a lot of practices have just one or two people doing marketing, and sometimes marketing is just one of their many hats. If you're in that boat, you can set things up without a lot of money — just \$7.65 per month with 500 contacts — and hit the ground running.

Even the "Lite" version offers some great features, including unlimited sending, marketing automation, and up to three users. If you're not taking full advantage of email marketing and automation in your business, do a little research and see if ActiveCampaign is a good choice for you.



Are You Burning Out?

How to Fight Fatigue at Work

Everyone wants to be as productive as possible at work, but there can be a number of reasons that your output suffers over the course of your career. One such problem is job burnout, which can wreak havoc on your time management and the quality of your work. If you begin to experience job burnout, there are some steps you can take to get your attitude and work rate back on track.

Work burnout is so common that the world-famous Mayo Clinic has gone so far as to create a specific definition for the condition. They call work burnout "a special type of job stress — a state of physical, emotional, or mental exhaustion combined with doubts about your competence and the value of your work."

How do you know when off-days happen often enough to constitute burnout? Largely, it is a matter of degree. According to Psychology Today magazine, some telltale symptoms include "physical and emotional exhaustion; cynicism and detachment; and ineffectiveness and lack of accomplishment." In essence, if you are dreading going to work every day and feel you are getting nothing from your career, you are likely burning out.

There are lots of steps you can take to overcome feelings of disenchantment with your professional life. If you often take work home with you, make an effort to bolster other areas of interest. While at work, try to engage with what you do. Disinterested employees burn out faster than those with passion. In a Scientific American article titled "Conquering Burnout," Michael P. Leiter and Christina Maslach suggest surrounding yourself with co-workers who are positive rather than pessimistic. "Receiving good vibes from others is an uplifting experience," they write, "but so, too, is expressing them to others."

If a simple reset does not work, try consulting some resources, both external and internal. Internally, you can discuss the problem with your human resources team — professionals who have seen this problem before. A great external support is the book "Reclaiming the Fire: How Successful People Overcome Burnout" by Dr. Steven Berglas.

If you feel burnout setting in, do your best to get a handle on your mental state as early as possible. With a fresh perspective, you can be back to your best productive self and enjoy work again.

PLAN FOR YOUR LOVED ONES

How to Have That Hard Talk With Your Clients

There are some things in life you prefer not to think about. In college, it could have been something as small as your bank balance. But as life goes on, the stakes are raised, and the need for having hard discussions grows imminent. Planning for long-term care is one of them.

So, how do you engage in that discussion? First, keep in mind that this is family we're talking about. A caring financial adviser will treat the topic with the sensitivity it deserves. They can use their experience to explain your options based on your unique situation.

What to Discuss

You might start by telling them about your family. Are you close? What do you know about long-term care? Do you have a family member or friend who's had a long-term care experience?

Once you've painted the picture, you can get into particulars. Fewer than one in four consumers are confident that they will have the resources to pay for long-term care, according to research by Lincoln Financial Group and Hanover. That's where your financial adviser can be of the most help.

So, even if you think, "It won't happen to me," you should remember this statistic: Over 70 percent of those aged 65 and older will need care at some point, as reported by the Department of Health and Human Services. But we understand the discomfort and will do our best to help. To learn more about long-term care planning, visit us at UINtools.com.



Book Review: 'Run Your Business, Don't Let It Run You'

When Clay Mathile, owner of the Iams pet food company, sold his business for \$2.3 billion, he still had decades of business experience to offer. Eager to share the Professional Management System he developed in the face of owning a private business, Mathile founded Aileron, a nonprofit dedicated to helping private businesses establish sustainable growth. "Thinking and planning is an ongoing business process," Mathile states. "And it requires a leader to focus on three key areas: direction, operation, and control [the DOC method]."

Direction

- Leadership: To start, a business manager must always be transforming themselves into an effective leader. They do this by being self-aware, staying respectful of others, and holding to their personal values.
- Strategy: Rather than follow a strict process, true strategic planning relies on in-depth thinking, talking, reviewing, and learning to "prioritize resources and retain a sustainable, competitive advantage over the competition."

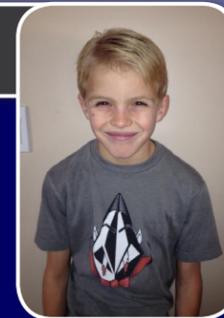
- Business Structure: An amazing strategy means very little without effective operations to manage resources.
- People Development: Employees are the driving force of every company, and by fostering talent through expanded responsibilities, educational opportunities, and accountability, leaders can create a passionate workforce more aligned with their vision.

Control

- Culture: An important step in creating a team, specific choices must be made to foster a unique and cohesive environment to build "a respectful workplace setting and provide a sense of purpose to workers."
- Performance Management: An outside board comprised of impartial, third-party individuals can focus on "big picture" issues, monitoring individual and collective performances that can be improved when needed.

"Run Your Business, Don't Let It Run You" is a valuable resource to all business leaders, regardless of industry or the current size of their business. Mathile's blueprint for long-term goals offers strategies for greater focus, sustainable growth, and an end to 16-hour work days.

SETHSCAPADES



You've probably seen fidget spinners. They became all the rage this summer. The inventors claim that spinning these little gadgets reduces stress. Seth, however, put a different spin on it.

After making me drive to four different stores to find one, his inquisitive mind took him in an interesting direction. You see, Seth is an amateur YouTube videographer. In the past, he's uploaded videos of himself doing backflips on our trampoline and a short film of him fighting his friends. This time, he decided to try capitalize on the fidget spinner craze.

He and his friend concocted an experiment. They blew on the fidget spinner with an air compressor, causing it to spin at a ridiculous speed. Then they tapped it on an iPhone to see what would happen. Any guesses?

Sure enough, the screen cracked like a spiderweb. The has amassed over 100 views, making it his most popular.

But there's a twist to the story: The iPhone was his mother's old phone, which he didn't have permission to destroy. While we applaud his inquisitiveness, for the lack of permission, we gave him a talking to.

You can see the video on his YouTube channel, sethdeathy.com, or sethscapades.com.

Sudoku

7	3			5				
	4			6				
		1		9			5	
	5			1			9	2
				4	7		5	8
3				7	2			
6	9						2	
				6	3		4	

9	7	4	8	3	6	5	2	1
8	3	2	6	1	5	4	7	9
5	1	6	2	7	4	9	8	3
6	8	7	5	3	1	2	4	9
2	4	3	9	8	7	1	5	6
4	2	8	1	3	6	5	9	7
7	5	1	4	2	9	3	8	6
1	6	9	8	7	3	4	5	2
3	8	5	7	2	1	6	4	9
8	6	1	4	2	9	3	5	7
5	4	9	7	6	3	8	2	1
7	3	2	8	1	5	9	4	6