



# My Secret Recipe for Greatness

## The 7 Biggest Lessons I Learned as a Financial Executive To Break the Mold and Be BOLD!

### #1 – Molds Are for Jello!

In an era when women were not hired as stockbrokers, only as secretaries to stockbrokers, I was one of the first women on the west coast to earn my Financial Principle's License and open my own investment broker dealership, hiring my own stockbrokers (women and men). The walls in Wall Street were high for women, but I made it my career for nearly 35 years as an owner of my own firm and later as partner and president of a private boutique investment advisory firm.

Breaking any mold, or preconceived way of doing things, requires BOLD Thinking....it requires the perspective that WHAT IF IT COULD BE ME? I learned how to contemplate the possibility long enough, to convince myself that it could be me. That led to BELIEF. Did my belief waver? Yes, of course. But, you must DECIDE FOR YOUR DREAM – that takes strength of conviction. Because when times get tough, you are the one that's got to decide, hey, "I'M DOING THIS THING!!"

### #2 – Boldly Choose the BEST MENTOR in Your Field

The ONLY reason this is not NUMBER ONE is because the #1 lesson has to be an inner decision first. But right on the heels of that, the next most crucial thing I learned was ALWAYS, ALWAYS, ALWAYS engage the very best mentor you can find.

By "engage" I mean find a way to create an important trusting relationship with someone who has the knowledge and experience at the highest level you can find.

I cannot emphasize this enough. This lesson is actually NUMBER ONE in disguise!

Right out of college I chose a major Wall Street firm that was known for their BEST training. I found out who was the Number One top salesman in the whole company





and flew from LA to Minneapolis over Christmas holidays to sit with this man in his office and observe and ask questions, and engaged his interest in helping me. Then as luck would have it, I partnered with a man who had years earlier had his own broker-dealership in New York City, and ready to retire, he told me step by step how he did it. I just did exactly what he said worked for him!

GREAT MENTORS WILL ACCELERATE YOUR PROGRESS TENFOLD!

## **#2 Invest in Yourself**

Educate yourself. Put your first money into building your craft, your skill, your licenses, your degrees, your pedigrees – your foundation.

I learned that in order to NOT be intimidated by all the brilliant people in Wall Street or by sophisticated investor clients, I wanted the highest credentials. Yet what helped me more than the knowledge was learning how to articulate and communicate that knowledge in an empowering way. Educating my clients became one of my hallmark strengths, rather than the condescending norm of the industry.

I love encouraging people to INVEST IN YOURSELF. INVEST IN YOUR DREAMS.

## **#4 – Be Decisive (It's a Learned Skill)**

One of the most famous investors of our time, John Malone, the Cable TV mogul, has said that his \$8.6 billion net worth can be traced back to ONE DECISION he made. Of course, a whole lot of decisions followed, but he can point to that one.

How many parts of your life, your financial gains or losses, a relationship that flowered or failed, could be traced back to a single decision? Shakespeare wrote about the tides in the affairs of men turning on a moment's decision.

As an investment professional, my duties included voluminous research evaluating companies, studying quarterly reports, spotting industry trends, charting daily movements of stock prices, analyzing the veracity of research reports. My partners





and I would have portfolio theory meetings and debate and justify whether a company would make our clients money or not. But all that work always came down to ONE DECISION.....do I Buy or do I Sell this stock or bond today? Or do I pass?

Special Note: I also learned (the hard way, but that's a story for another time) that a decision to do nothing **IS** a decision. It has its own consequences!

I learned to manage multi million dollar portfolios ONE DECISION AT A TIME.

Over time, that is how you build anything, really.

You can build your dream, any dream, with one decision – DECIDE, DECIDE, DECIDE FOR YOUR DREAM, TODAY!

## **#5 – Put Yourself in Other People's Shoes**

Would you do business with your company? I learned that what people really want in an advisor is:

- Access
- Expertise
- Service

This is true for financial advisors, executive coaches, and mentors of any kind. Many research studies have proven, and my own experience confirms, that most clients will stay with you, even if they aren't getting exactly the results they originally expected, if they have grown to trust and value you and your expertise.

Learning how to GROW TRUST AND VALUE requires putting yourself in your clients shoes and making the experience meaningful.

## **#6 – Loss Aversion is Normal**

I learned that human behavior, especially around money choices, can be wildly non-rational! In fact, the hottest new investment theory is based in behavioral science that has identified the one single most powerful phenomenon that shapes people's perceptions and choices – our aversion to loss.





I have always been fascinated that clients experience the sting of a loss far more than the pleasure of an equivalent gain. In fact, I have learned that people are quite willing to take on outsized risk, even to lose more, just to have a chance to get back to break even (to a no loss position).

What does this have to do with you and your dreams? Well, we all experience loss in life. What I learned is how to cope with it. Loss is normal. The key is to recognize the loss. Take the loss. Learn its lesson. Then clear the deck. Look at what's left, what you DO have, and start freshly.

There's always the next hot stock making a new move. There's always a new opportunity coming down the track. There's always a new day and a new dream. Take the loss ; put it in your past; and move on! As they say in Wall Street, "Fresh Capital covers lots of mistakes". Give yourself FRESH CAPITAL today. FRESH IDEAS are FREE. Get a new idea and start again!

## #7 - Your Biggest Dreams Can Perform Miracles!

I used to think that a miracle in the market was what I needed most....one big splash, like winning the lottery, selling the business for millions, then I could be a hero with all my clients and family; I could retire carefree and move to the beach. Then something happened. I took a course in Spirituality, eventually completing a 3 year course to become a state licensed spiritual advisor. It changed me and my thinking.

I learned that miracles are in our midst everywhere, **everynow**.

I learned that "It is done unto you AS you believe". I began to see things differently. I began to appreciate the POWER OF BELIEF, the POWER OF A DREAM.

*One dream believed, and acted upon as if it is already done, is the simple and elegant formula for manifested creation.*

What if you and I started to dream up some REALLY BIG DREAMS?





It's true I have had a long and valued career in finance; I did retire from Wall Street and I do live on the beach! But now I am embracing the larger picture - helping people to believe in themselves, to create financial freedom and personal success....by living their highest vision.

Here is what I know - Your biggest dreams are not only possible, but they contain what I call "spiritual intelligence". Your dream already knows how to bring itself about and it can perform miracles!

My dream is to help you manifest your biggest dreams – a recipe for greatness.

It's time to take your dreams OFF THE BACK BURNER. You are standing on the brink of possibility. There is a dream just waiting to be expressed in and as YOU.

### **Your biggest dreams can perform miracles.....Let's have THAT conversation!**

The biggest step to change is the very first step. Even if you've tried before, we've been given the gift of time and the ability to try again.

When you do take that step, why not try my recipe for success and make it your own!

If you are looking for a mentor who has walked the walk and tackled the impossible, making it possible – become a Patron in the Café of Dreams.  
Let's connect!

Thank you for your attention,

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