

FocalPoint CASE STUDY

F. Shellie Reed — *Financial Services*

Profile:

Mr. Reed is a retired police officer who has run his own financial services business for 17 years.

The Challenge:

In early 2003, Mr. Reed had reached a turning point in his second career and was struggling with where to take his business. Did he want to convert his book of managed assets to a larger more established broker/dealer, or continue on his own?

Mr. Reed realized that there were numerous concerns and unknowns involved with running his own business; but felt so overwhelmed by them that he had difficulty effectively organizing and prioritizing. He knew his real strength was managing his clients' accounts, and wasn't sure managing all facets of the business was for him.

The Solution:

FocalPoint Module 1: *Gaining Power Through Clarity* helped Mr. Reed and his business partner create a template for setting goals, developing action plans, and prioritizing activities. Especially useful to Mr. Reed is the Mindstorming Method of Decision-Making he learned in Session 12.

The Results:

On July 11, 2003 Mr. Reed opened the Geneva, IL branch of A.G. Edwards. He is now Branch Manager and Senior Vice President, Investments, managing approximately \$150 million in assets.

Mr. Reed continues to use the methods he learned from his FocalPoint coaching, and has introduced his staff to FocalPoint's goal-setting and action-planning techniques.

