

# **COVID-19 PROTECTION PLANNING:**

## **How To Protect Your Firm Now And Position It For Growth Later**


### **Workbook**



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## NOTES



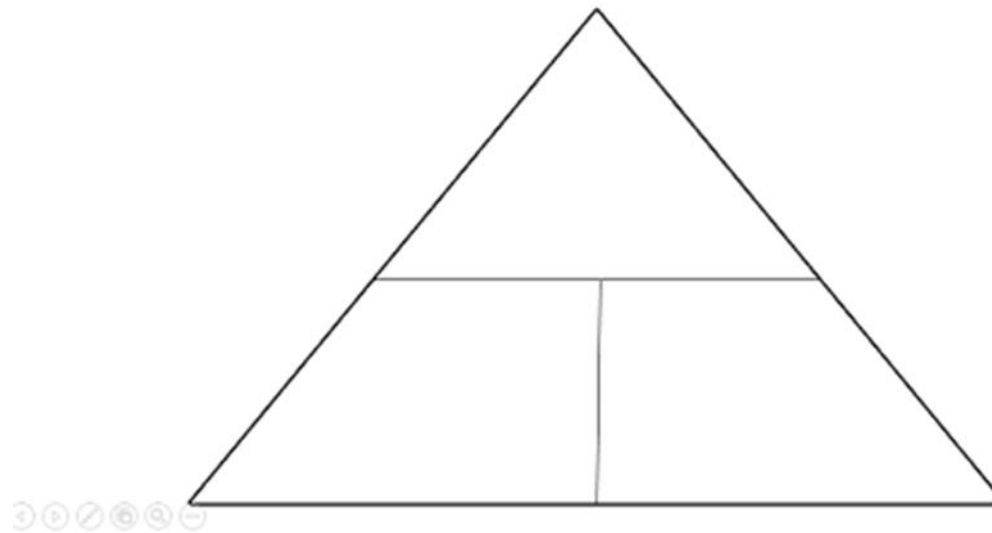
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## THE FUTURE



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## THE SOLUTION: PROTECTION PLANNING FORMULA



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### 3 KEY PRINCIPLES FOR PROECTION PLANNING

Principle	Notes
<p><b>1. Protect</b></p> <p>(a) You and Your Team</p> <p>(b) Cashflow</p> <p>(c) Clients</p>	
<p><b>What do you most need to protect right now?</b></p>	



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**2. Personal Leadership**

(a) Yourself

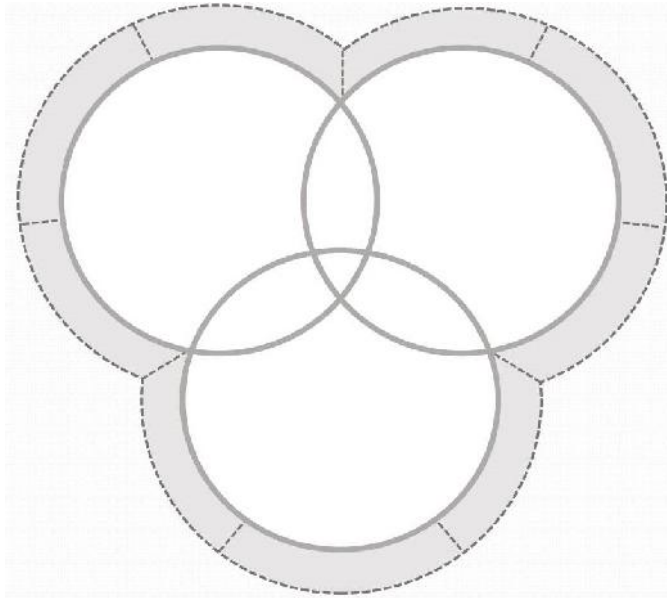
(b) Your Team

(c) Your Clients

**What do you most need to upgrade about your leadership?**



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### 3. Pivot

#### (a) Attract

- Current Needs
- Context
- Consistency

#### (b) Convert

- Fees/Value
- Skills
- Process

#### (c) Maximise

- Delivery
- Current Clients
- Time/Focus



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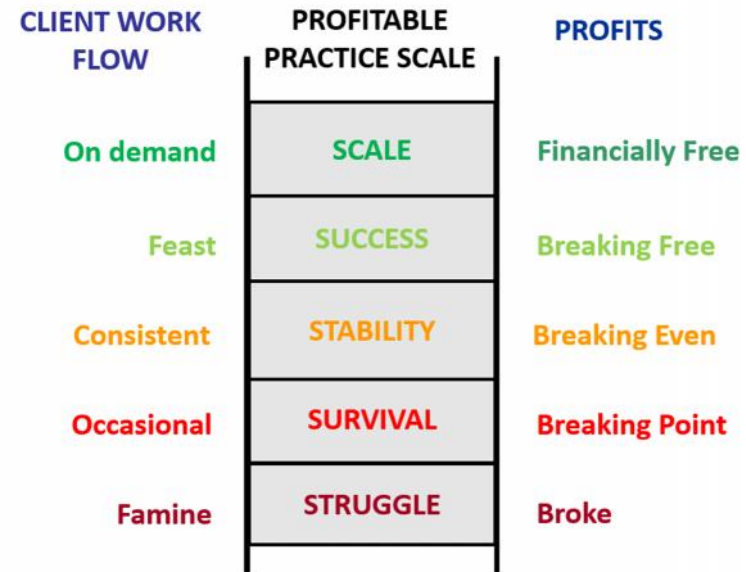
<b>Top 3 Pivot Priorities</b>	1/
	2/
	3/

### NEXT STEPS

Step	Notes
1.	
2.	
3.	



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