

## Open Mic: November 18, 2009 Recap

**Highlights:** *These Open Mic hours are like the children of Lake Wobegon: all of them are above average. This one had a special quality, however, or a number of them. I read an update about the successful career re-entry of “Bob,” the finance professional whose story of financial betrayal riveted us during September 30’s Open Mic; we received a report on Nazrudin from the horse’s mouth, i.e.. the splendid host of this year’s gathering in Rapid City, SD; we heard about and ‘transformed’ a new life planner’s anxiety about her upcoming first life planning client meeting; several attendees’ described their recent experience of the Kinder life planning training; and some folks shared info on how they prepare for and center themselves before each client conversation. In short, something for everyone, as witnessed by statements about how this OM was for participants: “caring and inspirational,” “reaffirming,” “encouraging and positive,” “an experience of genuine community,” “feel like I made new friendships,” and “tender.” If this synopsis has whetted your appetite for the full Recap, please proceed. And remember to join us on **Tuesday, November 24 @ Noon eastern for a special pre-Thanksgiving Open Mic.***

### **December Open Mic Calendar:**

**Wed., Dec. 9 @ 5:00 p.m. eastern time U.S.**

**Tues, Dec. 22 @ Noon eastern**

### **NOVEMBER 18 OPEN MIC RECAP:**

**Centering Practice:** I led a 60-second guided meditation designed to offer a rapid route to relaxation and centering. These brief practices help us to get the road noise out, and to really “arrive” wherever we are. As usual, participants reported the experience as being calming and, as one said, “*necessary.*” Think of it as a one-minute investment in yourself; it’s safe and non-habit forming, when taken as directed. (Amend that; in the best of circumstances, it is wonderfully habit-forming.) Therefore, you can self-administer as many doses as you like, during the day. Why not try it ... maybe even right now?

**A Hope or Wish for Today’s OM Hour:** I asked the following appreciative question, to learn about attendees’ aspirations for this OM hour: “*What outcome of today’s Open Mic do you dare not wish for, because it would be too outrageous?*” Well, there’s one in every crowd, and our “one” wished for twice the income and half the work. (Oh, well.) Another participant, a new life planner, who was anticipating her upcoming initial life planning client meeting, dared wish to “transform terror into excitement.” That’s something we can work with, much more easily than doubling income and halving the work. Stay tuned. We addressed it later in the hour.

**What About Bob?** I reminded attendees about an OM attendee in late September, who told a compelling tale of having his life savings squandered by “a rogue planner,” and having to re-engage in the world of work, after his five years of retirement. I read the following email I received from him (after receiving his permission to share it with OM and with you):

Subject: This Eagle Has Landed

“Hi Ed,

It's a done deal, I am now the Director of Business Development for Advanced Control Technologies, Inc. ([www.act-solutions.com](http://www.act-solutions.com)) a supplier of sophisticated energy management controls and LED lighting products. I actually started a couple of weeks ago and was in Indianapolis most of this week, getting up to speed. This is a company run by my fraternity brother and roommate at Purdue, back in the day. While I was in the office in Indy we set up trade show arrangements for Orlando in January, Philadelphia in March, and Frankfurt in April (for 7 days.) I'll also probably be going to China in May with him to see the factory and talk with suppliers. They only have about 16 employees, but the sales potential is awesome.....not for their old products so much, but for the LED lighting products. The worldwide move towards energy conservation is a mega-trend that plays right into our plans.

Anyway, I'm back at it, fulltime more or less. We plan to continue to stay in Florida and Wisconsin, like the last 9 years. I expect this will take off like my other situations and we have a good chance of getting back to a reasonable position again in five years or so. Who knows? Life's totally unpredictable. At least my life is totally unpredictable.

I have searched my own soul and decided this decision is not a reaction to a bad experience with a rogue planner. In fact I plan to continue my membership in the FPA and very much want to keep up with my friends in the financial planning profession.

Ed, thank you for your support and assistance these last couple of months. I appreciate your efforts on my behalf.”

I asked attendees to share thoughts and feelings engendered by Bob's message. Among the responses: “There's justice, after all.” “If you speak with him, tell him I'm praying for him.” “It made me sad. He's about my age, and it sounds like his life was dramatically changed. I know I have lower energy than when I was younger, and I wonder about his.” While acknowledging the validity of her concerns, I noted that sometimes when we identify with a client's circumstances or personal attributes, we can tend to make assumptions and over-identify. To prevent this, we need to inquire openly about the client's reality. For example, I described my perception that Bob is blessed with a robust level of energy; I'd trade adrenal glands with him in a heartbeat. Pausing to take in my words, she stated that she had indeed been going that extra step and making assumptions about Bob's and her characteristics.

***Report from the Nazrudin Front:*** Rick Kahler, who hosted the recent Nazrudin gathering in Rapid City, gave a report. (Ordinarily, I mask OM attendees' identities. Rick's role as host is a matter of public record, however, and I'd feel silly keeping his name under wraps.) His experience of the event was “pure pleasure,” partly because the K-Bar-S Lodge handled conference registrations -- the first time, and very clearly the last time, they will make that mistake. Everything went flawlessly and it was a wonderful, informative, and high-connection gathering. (Oh, yeah? If it was so flawless, how come I spent 17 hours in the Minneapolis airport, en route? If you need any info on the fine restaurants there, let me know.) And if you would like more info about Nazrudin, please contact me.

***Transforming Terror to Excitement:*** our new financial life planner, fresh from the five-day Kinder Institute training (truth-in-disclosure: I was the lead trainer), described wanting to “do it right” with her new client. She accepted my invitation to experiment with a quick exercise. With eyes closed, she imagined (in response to my guided imagery) being with her client and witnessing the client’s Torch being brightly lit. (Note: in this approach, the “Torch” is a vivid, compelling vision of client’s deepest life aspirations. It serves as the cornerstone of the ensuing financial life plan). Describing her experience of the exercise, she noted that when she visualized the client’s Torch, she felt a strong, powerful bodily “JOLT.” I suggested she keep this scenario vividly in mind as she plans for and conducts the life planning sessions. She agreed, adding that if she did so, “There would be no room for anxiety to take root.” Sounds like Gresham’s Law in reverse.

Participants empathized with her, and with her situation. Several shared their initial life planning experiences, including the vivid thought, “I better not screw this up.” They offered her the prediction, “You won’t. A second “newbie” life planner (also in last week’s Kinder training) described his recent experience with a current client. He was able to sit with her amid her situation; she is a professional opera singer who is facing imminent surgery for throat cancer. (Yikes.) He acknowledged that “her news hit me hard,” but that he stayed present and stepped into an authentically supportive and helpful role. He told us, “I am planning for this whole family.”

***Your Two-Minute Drill:*** I asked how participants center themselves for client meetings. A participant who is a pastoral counselor with an M.B.A. (go figure) offered an eloquent description. “Before I meet a client, I pray. Over time, you learn to be with a client in their high and low moments. You develop a presence over time, a professional way of being with them in which you empathize and you feel their plight; you still care, but you don’t get wrecked. You can connect to your feelings, without ‘losing it.’ As planners and counselors, we play a very big and unique role: we have -- and we hold -- the whole client’s story. Most often, other people – lawyers, accountants – get only the pieces needed for their work. We hold the whole story, and it makes our relationship special for the client. We hold all the chapters of their story.” Man, oh man! Who knew we were going to get a deep teaching today? Not me.

A participant whole-heartedly agreed, noting that he always asks the client what their agenda is; he often winds up relegating his own “must-do” agenda items to the last five minutes, because the most important, timely, and emergent items are the clients’, not his. And the resulting connection makes the relationship special, unique, and stronger.

***The Check-out:*** attendees gave moving descriptions of how this hour was for them: g “*caring and inspirational,*” “*reaffirming,*” “*encouraging and positive,*” “*an experience of genuine community,*” “*feel like I made new friendships,*” and “*tender.*” Yeah, like they said: tender and inspirational as all get-out. Please plan to join us at an upcoming Open Mic, and help shape the conversation.

Remember to join us on <b>Tuesday, November 24 @ Noon eastern,</b> for a <b>special pre-Thanksgiving Open Mic.</b> Call 1-219-509-8322, passcode 202779#.
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***Ed Jacobson***