



THE ART OF GETTING OUT OF THE WAY

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ESTATE PLANNING
TRUSTS
WILLS
ESTATES
BENEFICIARY FUNDS



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- Blockages
 - Masters Office
 - SARS
- Delays with banks
- Compliance
- Fees
 - Delayed payments
 - Resistance / client sensitivity – Executor fees?
- Cash flow issues
 - Operational Expenses
 - Staff costs



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Work with the
Self

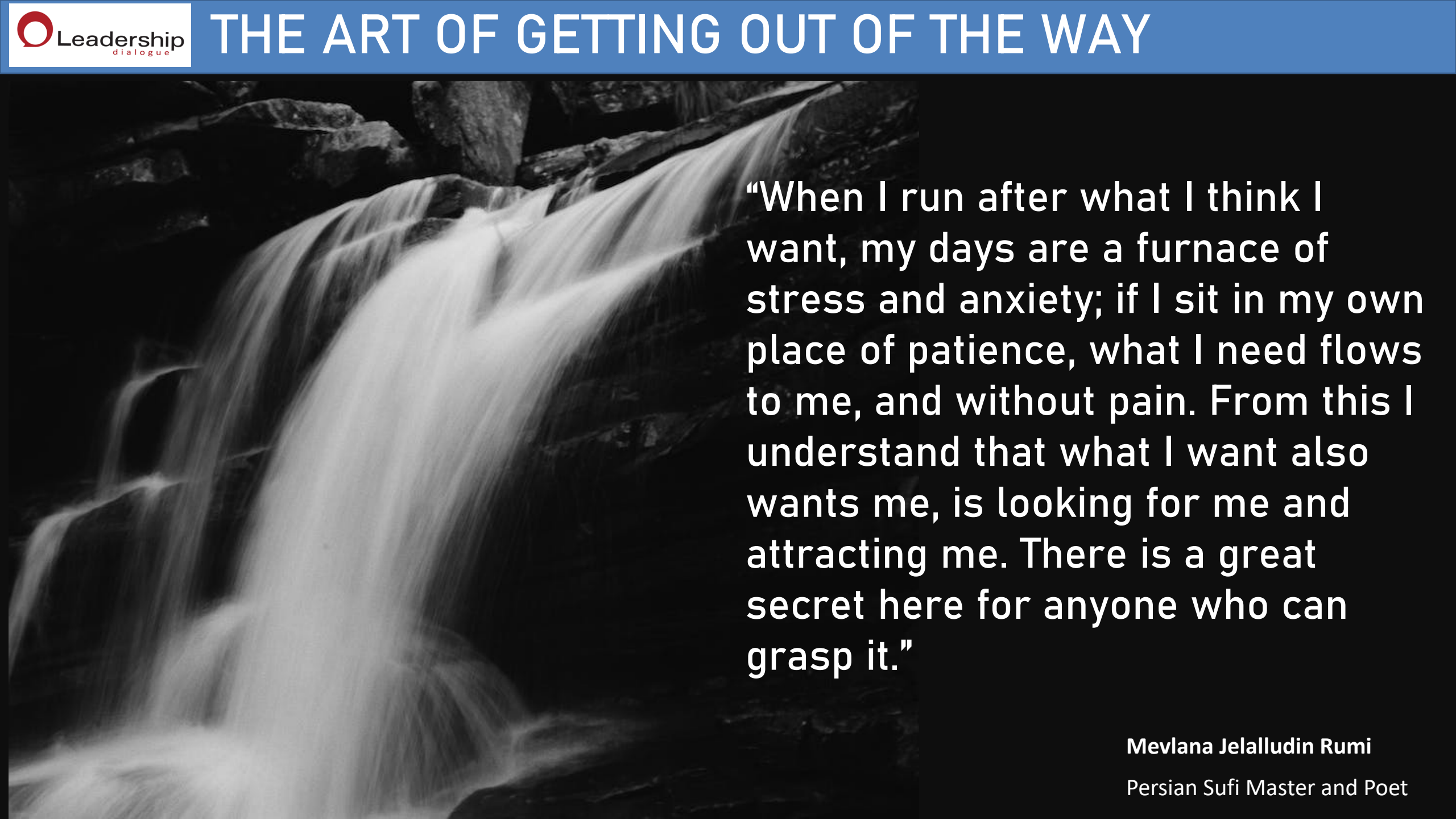
Advocacy

Operational
Efficiencies

Educating
Clients

Systems
Thinking

Systematise,
Routinise,
Automate

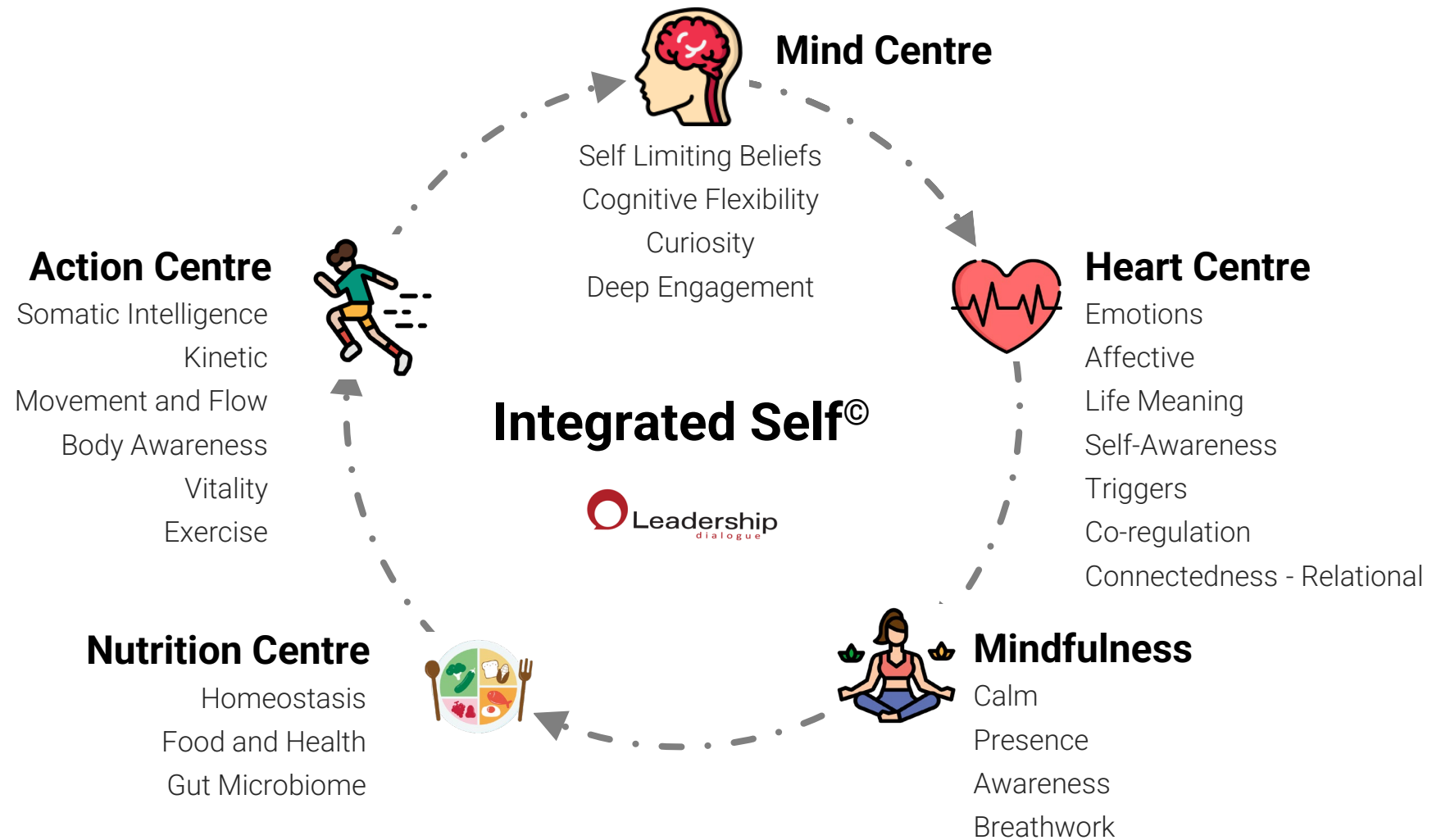


“When I run after what I think I want, my days are a furnace of stress and anxiety; if I sit in my own place of patience, what I need flows to me, and without pain. From this I understand that what I want also wants me, is looking for me and attracting me. There is a great secret here for anyone who can grasp it.”

Mevlana Jelalludin Rumi

Persian Sufi Master and Poet

PERSONAL MASTERY



- **KEY TOPIC**
- Is there anything else about that X?
- What kind of X is that X?



Where is ... ?

Location

Whereabouts ... ?

Then what happens?

Sequence after

What happens next?

What kind of ... ?

Attributes

Is there anything else about ... ?

Does ... have a size or a shape?

What happens just before?

Sequence before

Where does ... come from?

That's ... like what?

Metaphor



Systematise
Routinise
Automate



