

# The Good Life Checklist



## Step 1: Evaluate Your Current Situation

You're likely overwhelmed by administrative tasks such as compliance and client communication, which take time away from advising clients. Start by assessing how much time you're spending on these non-revenue generating activities, and identify areas where you need more support to refocus on your clients. Good Life will handle compliance, operations, and tech support so you can focus on growing your practice.



## Step 2: Understand the Benefits of Transitioning

If you feel hesitant about transitioning, reflect on the advantages of focusing on advising clients while gaining operational support. Reach out to Good Life to explore how we can help you retain control of your practice while providing the necessary infrastructure to scale and enhance client service.



## Step 3: Review Your Business Model

You may have hit a growth plateau due to lack of infrastructure or support. Review your current setup and identify gaps that are preventing growth. Good Life will provide the systems, tools, and coaching necessary for scalable growth, helping your practice break through those barriers.



## Step 4: Plan for Compliance and Technology Integration

Managing compliance and technology integration can feel overwhelming. Plan for how to integrate new tools and streamline compliance processes. Good Life will ensure that all compliance requirements are handled and that your technology stack is set up seamlessly before the transition, ensuring no disruption to your business.



## Step 5: Develop Your Client Communication Strategy

You may worry about how to communicate the transition to your clients. Start developing a clear message that explains the benefits to them, reassuring them that the move will enhance their experience. Good Life will help you craft a personalized communication strategy that highlights the benefits of the transition, ensuring your clients feel confident and stay with you.



## Step 6: Prepare for Client Migration

The logistics of transferring client accounts can seem daunting. Begin planning how to manage account transfers and ensure clients are smoothly onboarded to new systems. Good Life will manage the entire client migration process, ensuring a seamless transfer of accounts and portfolios with minimal disruption.



## Step 7: Establish Your Brand and Marketing Strategy

Defining your brand and target market is crucial for standing out in a competitive market. Begin working on your brand identity, including your logo, website, and messaging. Good Life will assist in developing a customized marketing strategy that attracts and engages your ideal clients.



## Step 8: Set Up Operations and Business Infrastructure

Setting up your office, hiring staff, and managing operations can be overwhelming. Start planning how to optimize your resources and decide what tasks to outsource. Good Life will guide you through operational setup, helping you streamline processes so you can focus on growing your practice.



## Step 9: Get Full Support During the First 90 Days

The first 90 days post-transition are crucial, and you may feel pressure to keep operations running smoothly while acquiring new clients. Start preparing a roadmap for the first 90 days to prioritize client retention and business development. Good Life will provide comprehensive support during this period, including marketing, tech setup, and client communication, so you can focus on expanding your business.



## Step 10: Plan for Long-Term Growth

After the initial transition, focus on setting long-term goals for continued growth. Think about how to scale your practice and stay competitive. Good Life will provide ongoing coaching, advanced planning tools, and marketing support, ensuring you are positioned for long-term success.