

## ***Beyond The Numbers: Finding Your True North***

By: Director, Jimmy Trimble, CFP®

HB understands the importance of having a clear direction and purpose in all aspects of life, including wealth management. Just as our firm is guided by our mission, having a personal mission statement or life purpose can provide a "true north" that helps you navigate through life's challenges and distractions.

***"The two most important days in your life are the day you are born and the day you find out why."*** - Mark Twain

A mission statement or life purpose is like a compass that keeps you oriented toward your true values and goals. It helps you make decisions that are aligned with your deepest beliefs and aspirations. When faced with difficult choices or unexpected obstacles, your mission statement can be a guiding light that helps you stay true to your path and make decisions that are in your best interest.

***"He who has a why to live can bear almost any how."*** – Friedrich Nietzsche

In the context of wealth management, a clear and well-defined mission statement can significantly enhance positive outcomes while minimizing negative ones. When you have a strong sense of your values and goals, you can make financial decisions that are aligned with your, and your family's, true north. This alignment can lead to more satisfying and successful financial outcomes, as you are working towards a purpose that is meaningful and important to you.

***"Your time is limited, don't waste it living someone else's life."*** – Steve Jobs

Furthermore, a personal mission statement can help you stay focused and disciplined in your financial journey. It provides a framework that helps you evaluate opportunities and make decisions that are consistent with your long-term objectives. This focus and discipline are crucial in navigating complex and volatile times.

Here are some tips for creating your mission statement or life purpose:

1. Reflect on your values and beliefs.
2. Identify your passions and interests.
3. Consider your strengths and talents.
4. Think about the impact you want to have on the world.
5. Write down your statement and review it regularly.



And some resources that may be helpful:

1. [FranklinCovey's Mission Statement Builder](#) is a good place to start.
2. The job site, Indeed, has a helpful [article geared toward writing a personal mission statement](#). It provides you with examples of one-line mission statements (yours may be longer to encompass more areas of life) as well as a step-by-step guide for creating a personal mission statement.

Your mission statement or life purpose is a personal and evolving document that may change as you grow and learn. It is a tool that can help you stay focused and aligned with your true north, ultimately leading to a more fulfilling and successful life.

At HB, our commitment to you and your family extends beyond the financial realm. Our team is here to help you and to continue serving you “Beyond the Numbers,” as we explore more ways to enrich your life experience.

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To learn more or get help with your life experiences, please call 404.264.1400 or email us at [info@homrichberg.com](mailto:info@homrichberg.com).

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