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**100**

**Steve Moeller**

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Best of success,



John Bowen  
Co-founder, AES Nation

**John Bowen:** As successful entrepreneurs we all want to build great businesses. We want to make our little dent in the universe as Steve Jobs talks about but it's more than that. Many of us have built businesses and we've found that we're not happy. We're frustrated. We know we're capable of a lot more, a much higher quality of life, but it's not coming together. I have an extremely good friend who's joining us. This is going to be a very special episode that's going to be very powerful.

I've had the pleasure of working with Steve Moeller for almost all of his 30 years in financial services. He's been one of the top marketing consultants for the industry. He's really made a big difference for an awful lot of people including myself and along the way he saw something that many of us had known but didn't dive into and that was a connection of money and happiness. They aren't necessarily highly correlated. By taking action each and every one of us can build a phenomenal life but we've got to do it on purpose. Steve is here to share with us what works. Stay tuned, you're going to be glad you did.

Steve, my good friend, it's great to have you join us here on AESnation.com. You've certainly in the past helped me accelerate my own success a lot and quality of life and I wanted to share you with our fellow entrepreneurs so thank you for joining us.

**Steve Moeller:** Thanks for having me John. I'm really excited about being on your show today.

**John:** Well let's dive right into it. You have done some amazing things in your career. You've certainly been a catalyst for many organizations in the financial services and then you've really started looking beyond the financial services into quality of life. It's been a heck of a journey. Before we go in and helping other entrepreneurs to really dive in and be more successful on building great qualities of life, what I'd like to do is have you share a little of the back story of how you got here.

**Steve:** Well, you know for 25 years now I've worked with financial advisors, typically quite successful financially and helping them build their businesses but gosh, probably 20 years ago John, when you and I were working together closely, I realized that a lot of these people were winning awards from their firms for their sales production for their income levels but they weren't winning awards from their families. I found many of them were actually when they would talk to me privately were very, very unhappy. So they were making a ton of money but they were, many of them were really I would actually say, I call them successful miserable people. So I realized that if I helped people build businesses that increase their income but made them miserable, well first of all I didn't think it was a very good business model and secondly it wasn't something I wanted to do. I wanted them to have it all.

So I started to research quality of life and look into what is quality of life and how do we get it. That was really the beginning of sort of this turning point where I started focusing on helping

people build high quality businesses that were very profitable and very valuable that also supported a high quality of life. That's really become really my passion now.

**John:** Yeah, it's a great passion. Steve's experience is with financial advisors but I got to tell you, Steve you and I both have worked with a lot of entrepreneurs and this is not unique. There's so many successful entrepreneurs. We're charging, we're charging ahead. We're not necessarily bringing our family along. We're not bringing our teammates along. We're not even bringing us along on this journey. We've seen it wreck so many lives. Steve you and I have friends who've gone through terrible divorces, bankruptcy, financial ruin and some who've somehow skated through on the financial side and still hate their lives. It's kind of crazy. Why don't we go and let's talk about kind of this correlation of money and health, I mean money and happiness because you would think, geez, if I start ... I remember when I grew up in upstate New York and if I ever made \$50,000 a year, life is taken care of. The number just keeps on getting higher for most of us as entrepreneurs as we have success. Actually I can think of one time when I made the most money I've ever made in my life and I was miserable.

**Steve:** Yeah, right. So no direct correlation right?

**John:** Not at all. So tell us a little bit about your investigation on money and happiness.

**Steve:** Well one of the more interesting studies I read was when Ed Diener studied the Fortune 400 wealthiest people in America and asked them on a scale of one to seven how happy and satisfied are we with your life are you? They rated themselves five point eight. Well that's pretty good on a scale of seven but they also ... it was actually his son Robert Biswas-Diener, who interviewed the Masai tribesmen in east Africa. They live in dung huts. They herd cattle. They have basically no electricity, no money. When they asked them how satisfied and happy they were with their lives, five point seven. So almost exactly the same as the wealthiest people in America. So there's really no direct correlation to money and happiness unless you're poor. So it turns out that once you get to a point of income where you can satisfy all your basic life needs, roof over your head, food, housing and so on and typically in America that's sort of upper middle class. It's not super wealthy by any means. Beyond that additional income has very little impact on your quality of life.

What impacts your quality of life is what you do moment by moment everyday. So that's the thing we have to really think about as entrepreneurs is, what are we doing everyday that lights us up, brings joy to our lives so that we're not just chasing money? Hopefully make enough someday, and I call this the American happiness myth. If I work really hard, make a lot of money, put up with a lot of stress, someday I'll be happy. Ultimately we want to be happy, enjoy the journey right? Everyday.

**John:** What I find Steve is so many of us as entrepreneurs, what we're willing to do is work really hard to accumulate wealth and we trade our youth for money and then as we get older we're paying all our money back to get youth or health, if you will.

**Steve:** Yeah, for health, well because the stress creates a lot of health problems. Absolutely.

**John:** Yeah, it's crazy. Most of us as entrepreneurs, we're aware of those. I would be surprised, whether you're listening to this on the audio podcast or watching it at video podcast or AESnation.com, you've had this. You kind of in the pursuit of building a great business. The quality of life isn't there and one of the things, Steve, you and I have always talked about is being successful on purpose. I want to go, we're going to talk about your book in a little bit, but you've got some great guidance here and I want to take some of the areas that you talk about in your book and I'm not going to do them justice but just at a high level. One of the first things you talk about is having a clear vision. Tell me why that's important.

**Steve:** Well, you know if you think about it, everything that's ever been created by human beings started as a basic and impossible dream. They thought about it for a while. Put some plans together. It became a vision. Then they used this amazing capacity human beings have called imagination and they turned their vision, their dream, into reality. So we have to have something we're focused on, that we're working towards. In the bible it says that people without vision will perish and scientists have found that when people try to commit suicide and they live through it, they're called para-suicides, they were asked in the interview, "Why did you try to commit suicide?" It's not because they had this horrible vision of the future, it's because they lacked a positive vision or positive anticipation of the future. So this positive anticipation is working towards meaningful goals.

It's hugely important and if we just put our nose to the grindstone and work, work, work, what I saw is so many people built these businesses that maybe they did create good income but they didn't have a clear vision of a business that created high income and quality of life. So they got half the equation but unfortunately they didn't get the half that most of us really want which is to be happy and satisfied and just feeling good about ourselves and our lives everyday.

**John:** I'm in Silicon Valley. There's a lot of young people who are out there trying to build a business to flip basically. To sell it and get the money right away. One of the things you and I are big believers in is that by being successful on purpose, being clear on your vision and having it include not only making money. The one beautiful thing about capitalism is by delivering value to others we get to do well but building that business ... geez, I mean, you share in your book and there's a lot of research on this, that we can increase our overall productivity by really focusing on building not only that great business for all of us but quality of life as well. One of the things I want to go to kind of the second point Steve is, so we get

this core vision. We've got it. Second part you talk about is finding what lights you up. Tell me what that is.

**Steve:** Each one of us is really unique. We have unique personalities. We have unique talents. I happen to be tone deaf. I love music but I couldn't be a good musician. So part of life is trying to identify what you do well, easily that other people have difficulty with, that you love doing. You could do something well and not enjoy it and that wouldn't be good but if you identify what you love doing, your unique talents, probably God-given talents and then you are able to express those daily in your work then not only are you doing something that gives you a competitive advantage but you're having fun in the process. So you're trying to combine those two things and find kind of your sweet spot for what you should be doing in life and then expressing your talents and your strengths and your interests, pursuing your interests and passions.

**John:** What I find is that we all have unique abilities and it's usually what we're good at we enjoy doing.

**Steve:** Mostly, yeah.

**John:** What we don't enjoy doing we shouldn't do and that's really point three on what you're talking about and really creating tremendous lives is to, if you're not good at it ... one of the mistakes I see so often is that entrepreneurs, because we're so used to charging ahead, okay, I got my strengths, our unique abilities, I'm going to make a big difference there, but my weaknesses, I'm going to work on those and I'm going to get really strong and I always look at it at the end of my career I'm going to have really strong weaknesses. That's not going to help me. You talk about delegation. You go that clear vision, number one. Second we've identified what lights us up, which really gives us that creative energy that gets us excited every day that we really enjoy doing and three, okay there's some things that need to be done that we're not going to do.

**Steve:** Well that's part of that knowing what lights you up and what turns you off. Then really organizing, if you're an entrepreneur, you have the ability to create your own business, your own life, organizing your life so that you have other people, either outside vendors or internal employees, that are doing the things that you don't like to do and that frankly you're probably not very good at. It's what's critical I think is making sure that you hire people that they get lit up and that they're in their sweet spot or their endorphin zone, is what I like to call it, doing the things that you don't like to do. So many entrepreneurs, it's particularly when they're smaller in the beginning, they hire people that they like and that are more like them. What you really want to do is hire people you like that have different interests and different skills and different talents and then they complement you and then you don't have to do the stuff you don't like to do. If you reduce stress that increases your happiness. If you increase positive



emotions, that increases your happiness. So you have two ways, reduce stress and creates happiness and ultimately you're trying to do both of those as much as you can.

**John:** As a matter of fact, I'm going to encourage everybody, I did a recording, we haven't posted it yet so I don't know the episode or I'd tell you. Mark is a co-author of a book called Rocket Fuel and what he talks about Steve is that we're so often, the entrepreneur, the lead entrepreneur is the creative one, kind of a visionary like yourself and I like to believe myself too. What happens is there's a lot of stuff we're not good at and he calls what I would normally call, most of us would call, a chief operating officer, finding that integrator, that individual, that rare individual who loves what we don't do and by combining the two, boy what a freeing opportunity. I think that falls so well in place but it's not only delegating to internal but jeez, with the technology today, our ability to, we're here talking Skype. It's pretty amazing. It's free. You and I, we're both in California, northern and southern but we could be in Perth, Australia one of us and the other in the UK and it wouldn't make any difference. The technology allows us to leverage our self.

So we've got clear vision. We're going to light ourselves up. We're going to delegate. We're going to get everything off the table and we're going to do it very effectively. One of the things though that I love in your book that you talk about and you and I are big believers in this, is creating the right environment. Why don't you tell me about the environment, how we do that as entrepreneurs.

**Steve:** Well creating the right environment is really what I would refer to as creating your own greenhouse. You know what happens with plants, let's say you take an orchid and put it in a greenhouse for cactus, or probably the opposite, you have an orchid greenhouse, you put a cactus in there. It might survive but it's not going to flourish or thrive. So you want to surround yourself with the right people. Put yourself like you have, in a really positive environment. Environments make a difference in your quality of life. I remember when I first moved to southern California, I had a beautiful view of Catalina Island from Newport Beach area. In the same building there were suites that were downstairs and they had no view at all. So I would go to work everyday and the view itself, the environment would light me up and then the people were friendly. So the whole environment should be a greenhouse where you have the right amount of air and water and sunlight. You can flourish. So the environments do make a big difference and being conscious of what's around you and the people around you is very important.

**John:** I think one of the things is entrepreneurs do that this does to you is that it allows us not only for ourselves, I mean this is kind of where the enlightened self-interest is. If you as entrepreneurs, you're creating an environment that engages the rest of your team. That you can create this kind of multiplier effect if you will because each entrepreneur that you're working with, they can be employees, they could be outside contractors, whatever

relationships, but by creating the right environment, delegating to their strengths, you doing what you do really well, what happens in each of our enlightened self-interest we're creating a bigger pie in serving the clients because we got a clear vision now what we want to do. People light up as well. Boy productivity increases dramatically.

**Steve:** Yeah, you know a lot of entrepreneurs sort of want to create a business that supports their quality of life and they're okay if everybody else's grinding it out and stressed out and working hard as long as they're hitting numbers and so on but as you mentioned earlier, people that are in positive states that are feeling happy and good about what they're doing, they're much, much more productive and more creative. What happens when you go into a negative state, you're stressed out, you just, bad environment in terms of the energy in that business, the blood runs away from the higher levels of your brain, the neocortex and you go into more reptilian brain and you're much less productive and you're much less creative and you're much less effective as a problem solver. All of those things are critical in most businesses today, innovation, problem solving and interacting with other people in a way that brings out the best in them.

**John:** So we've got kind of this road map we're putting together. We've got this clear vision that we're going to have. We've got the ability to light each other up really, you know in the organization. We're going to get clear on what lights us up first as two, but three anything that doesn't we're going to delegate it and this is so freeing. Entrepreneurs, Dan Sullivan, a good friend of both of ours, Dan talks about that most entrepreneurs are looking for freedom and it's freedom from time is one of the biggest drivers but it's also a freedom choice of relationships, freedom of purpose, getting clear on what you're looking to achieve and by getting the right team on the right bus, as Jim Collins talks about, we can make a big difference.

What I love Steve is having the right environment. I don't know if you ever had, I had one job that quite honestly I hated. Just the environment, everything sucked it out. As we're going through this, let me go, I want to come back and talk about how do you get this all in organized, but let's do the last one which is legacy. Tell me what you mean by legacy. If we're doing all these four things and we're there, how are we going to leave a legacy?

**Steve:** Well, you know the great thing about creating an awesome business is that you have resources, you have more resources. You can impact more people in a positive way, if you can leave money to causes you care about, people you care about. So you can make a positive difference in the planet with your businesses and I think that's one of the most exciting things is the ability to not only create a good life for yourself but really for your employees and then even after you're gone that you've left the planet just a little bit better than when you found it.



If you look at the history of human beings throughout most of history the way that you would get wealthy is by plundering and taking the money from someone else. In the capitalistic system, it's the only system that releases the creativity and the energy of human beings to support and help other people and more and more people now are also concerned about the planet. So contribute to other folks on the planet, contribute to the planet's health itself. It just, you know, when you get to that certain point, knowing that you're making a positive difference in other people's lives is also something that brings a lot of joy and happiness and a lot of satisfaction to a lot of us.

**John:** This is what I love about capitalism is that you can create tremendous value and the way you create tremendous value you get rewarded. This is the legacy. It's not, there's concept of social entrepreneurship and certainly you can give money to causes and so on, but really just being an entrepreneur alone, you're creating tremendous value. If we take each of these steps, having a clear vision, identifying what lights us up, delegating that that doesn't, and creating an environment that's conducive to really the creative, the innovation as Steve's talking about, we can build a legacy. Steve what do we do if we're an entrepreneur and you've certainly seen it, I've been one of them, where we get off track on this and sometimes we've got partners that were in challenging things. How do we get back on track on this journey?

**Steve:** I think that gets back to that vision question. Where are we going? Start with the end in mind as Stephen Covey said. I was thinking about, one of the things I missed is that, one thing I've noticed is if you set out to make a lot of money and you're a smart person, you're a hard worker, there's a good chance you'll make a lot of money but you'll miss that important element. If you set out to build a great business, make a lot of money and create a high quality of life, in other words, if your vision is more holistic and includes both of those things, then you're very likely to achieve that.

Whatever you dream about, whatever you put energy into, you bring about. So I think you really have to do is you have to stay focused on what you're trying to do in terms of quality of life as well as income and when you get off track, get back to that vision, say, "Am I really going where I want to go? Is this working for me?" If not, you've got to make some changes. I think the changes are much easier to make when you're clear that I'm going to go over here and this path's not taking me there so I got to get back on the right path, even if it costs you a bit of money because ultimately if you're going down the wrong path you won't have that balance between the happiness and the financial success that we're all seeking.

**John:** Yeah and I got to tell you that I have been in both situations, where kind of lost my way a little bit and was making really millions of dollars and was miserable.

**Steve:** Money can be very seductive but we have to have that clarity that it's only half of the equation.

**John:** I'll never forget Steve, you know some of the people that are involved and I don't want to go into names but sitting down and telling them I was no longer going to work with them and then getting offered more money and saying I'm going to take the night to think about it type thing and called my wife and I've got a great wife who kind of said, "Tell me again, why would you do this? We don't need the money", the whole thing. I do understand when you need money that can be a problem but here's the issue that I love and Steve and I've had these conversations over a glass of wine, on ski mountains and the whole thing. In the beginning in my life, I'll tell you, I was a driving, building a business and I would schedule time off. I was pretty good about taking six weeks off a year but the rest of the time I was just driving.

Fortunately I've got a wife of 35 years and she's been very understanding throughout it. I'm not sure I would have been had the situation been turned, but the last 15 years or so I got really thinking Steve about our conversations, now your book, and just this whole methodology and being successful on purpose. That last few businesses I've built have all been starting with that clarity of vision and doing a quality of life and a great business. I got to tell you, I've got so many friends and mastermind groups that are doing this, it really works.

**Steve:** Right. There's a lot of people buddy. It's sort of a new and evolving thing, this whole balance. It's interesting what you're talking about because I have kind of two basic concepts. One is money won't buy you happiness but without it you'll be miserable. So you have to have a certain level. Sort of the flip side of that is one of the most unhappiness creating things in life is getting paid more and more money to do something that you don't really like to do because now you're really selling your happiness for money and like you said, for most people you get to a point where it's not working. Then you have to say, "Well, what will work?" It's both. It's really pursuing, having a holistic idea of we can do it all and you said, if we start with that end in mind, that's what you create.

**John:** Yeah and I'll tell you it's amazing what you can create. I've been very fortunate and it's never been a straight line. I've written a number of business plans and had clear vision and the market forces give you a little bit of feedback and it's different. We can adapt and in today's world, with all the tools and technology, we can do that. It's really amazing. Let me go to this segment here. This is the book of the dead. Steve I'm going to put up on the screen your book, Endorphinomics: The Science of Human Flourishing. I got to tell you, we're good friends, but I'm going to be hard on you. It was a great book.

**Steve:** Thank you John.

**John:** I've read it twice. I've really enjoyed it, been on the journey with you and one of the reasons why I wanted to have you on is to share this with our fellow entrepreneurs because I know too many people who aren't on this journey that you and I are on. Not to say that we're

perfect by any means, but we are on that journey and I'll tell you it makes for a great life. Tell us a little bit about what's in the book.

**Steve:** The book, well, the science of human flourishing, what is the science of human flourishing? A lot of people what to know, flourishing, what's that? It's kind of a new concept. It basically comes from positive psychology, positive neuroscience, which is a new field of neuroscience, really studying the best in people. What is the good life, which the Greeks were very concerned about over two thousand years ago, and how do you achieve it? So I combined my thirty years of working with entrepreneurs and particularly working with folks that are about to retire, and you know, when you retire you have the opportunity to do whatever you want to do and a lot of people don't know.

So that was one of the impetus for writing this is that when you have the time and the resources to what you want to do, like you said, these entrepreneurs are trying to build their businesses to flip it. Well guess what, you still have to get up everyday and do something. I wanted to write a book that would help people think through how do you have it all? How do you have health, wealth and happiness? So the book as really five key steps. One is to commit to flourishing. Make that a big part of what you're trying to accomplish in your life.

Step two is discover your flourishing self. What lights you up? Where are you at your best? Number three is to create the positive vision of your life when you're doing all the things that light you up and none of the things that don't. I call it the endorphin zone. Where you're just having a great life. You have to get some data about yourself, know yourself. Develop that positive vision of your ideal life. Then you start to align your life with your vision. So those are four steps. You commit, you discover, you create that positive vision, and then you'll align your life with the vision. It walks people through the whole process, the scientific research, a lot of my personal experiences and stories and the each chapter has a page of questions at that you can ask yourself to help you clarify for yourself. What will put you in that positive state, the endorphin zone, what we call the human flourishing. Then once you know what that is, then you start to move towards it.

**John:** That's great. What it does is I think gives you the framework to not only move toward it but to stay there once you're there. That's just so important.

**Steve:** Yeah and framework is what a lot of folks say about the book. There's a framework for thinking about your life and for organizing your life to create the best possible life you can. That was my goal and I think its working.

**John:** Excellent. Definitely go get the book. Let's go to the next segment and this is the application of the day Steve. What application on your smart phone would you recommend your fellow entrepreneurs include on theirs?

**Steve:** One of the things in writing this book, I learned about was how important exercise is if you want to flourish. Not exercising everyday is kind of like taking a depressant. It just, don't have enough time here but, you know exercise is fantastic so I decided as I was writing this book, I wanted to be a role model for flourishing and I was a little bit overweight. So I got a FitBit which tracks your steps everyday and your activity. Then I got My Fitness Pal which goes in my smartphone and it tracks the amount of steps I take which basically translates to calories and then I track the amount of food I eat. So everyday I'm able to look at that and just like finances, you know, calories in, calories out and because of that I've lost 40 pounds. So now at the end of every day I see if I've exercised enough and I usually get up early in the morning and exercise and if I have enough calories leftover I can have two glasses of wine instead of one. I don't know if you know this John, but wine puts you in a mild state of euphoria so I highly recommend that.

**John:** You and I have talked about this but I've lost 35 pounds. We're on that same journey together. It's easier to—

**Steve:** Yeah, exercise is one of the best things you can do for yourself so those apps helped me a lot.

**John:** No it's great and I use one, I've used that and I also use breeze.com download on the Apple iPhone. On iPhone six it's a lot of detail on it too and it's just creating the energy. There's so many of these and I use a different one for running. I don't want to go too far into the fitness side but boy it just makes so much sense. Steve let me go to the next segment which is resources and let's just point out on your website. I'm going to go ahead and pull that up here. Let me show the endorphin zone and one of the things you and I talked about and once you talk about it I'll bring it too, is the quiz that they have available under the Endorphinomics.

**Steve:** Right, on the go to the books site, Endorphinomics, under Resources, I have in there a current life satisfaction survey. If you're not completely, say somethings are sub-optimal in your life, you're not quite sure what. This looks at the seven different, I call them endorphin domains, different areas of your life, and asks you how important is that domain to you and on a scale of one to five how satisfied are you. So you can go through and identify based on scientific research, the key areas of your life that will make a difference in your quality of life. You can identify those ones that are super important where you're sub-optimal, where it's a low score. So it's a real quick little way to look at that and the interesting thing is a lot of times when people take that profile John, I don't think I mentioned this before but, they're actual life satisfaction goes down because their expectations go up.

So sometimes they start higher and then you start thinking about all the things that I could be doing, I should be doing and then you go I'm not really that satisfied and then you start working on it back. You know you want to then focus on those areas that are sub-optimal that need

your addressing your health. That was one of the things for me for exercise. I realized that was an area that I had complete control over and that I would be a lot happier if I was a little bit slimmer. I don't know if you know this, a lot of people, they sacrifice their health or income and you want to have it all. If you get up early in the morning and exercise you'll have more energy and that was one thing for me. The life satisfaction survey, something I think everybody could benefit from and it's free, just download it from the site.

**John:** Yeah it's great and in the show link for AESnation.com we'll have the transcript, all the show notes, all the links so that you have that. Let me go to the last segment here. This is key takeaways Steve and I've got a whole bunch of notes and yeah, the big thing that, in my walk away is to be successful on purpose and it's not just about building a great business. You want to build a great life. We're in business to build a great quality of life. Not only for ourselves and our enlightened self-interest but all our stakeholders, our clients, our customers, our teammates, our partners. To do that Steve gave us five things that we need to do.

One, get a clear vision. Vision of not only your successful business but that quality of life that goes with it. Two, be very clear on what lights you up and only do that. That should be freeing for everyone out there. I know it was for me. I got stuck so often trying to do many things as entrepreneurs do. Delegate everything that you're not good at. Find the right employees, contractors, outsource but get people who light up for what they're good at that you're not. Then one of my favorites, and this is just so valuable, is create the right environment that's conducive for innovation, creativity, for you personally as well as your teammates. Do it in a way that's building a legacy. Even if you don't want a sustainable business long term, that you do want to sell it, by building it toward a legacy, you're going to maximize the value.

Steve I want to thank you sincerely for not only this interview but being great friends and all the help that you've given me along the way and I know all our fellow entrepreneurs if they take this to heart and they go and execute, not only their clients and their future clients are going to be really happy they did. Your family and you personally will be very happy. Wish you the best—of success.

**Steve:** Absolutely.

## A Second Opinion on Your Finances

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To help you find out if you are currently being served well, Financial Advisor Select is offering a complimentary second-opinion service to all qualified members of AES Nation. Simply [contact us](#) to schedule an exploratory call with one of our personal financial concierges. We will introduce you to a financial advisor who we believe has the ability to address your particular needs. The financial advisor will then meet with you and provide you with a second opinion on your finances. There is absolutely no cost or obligation to you.

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Why do we offer this service? Because at Financial Advisor Select, we have just one purpose: to help successful individuals and families achieve financial peace of mind by connecting them to top financial advisors in their communities. We look forward to assisting you.

Best of success,



John Bowen  
Founder and CEO  
Financial Advisor Select