

# EXCERPT

## SHOULD I STAY OR SHOULD I GO?

### BY MINDY DIAMOND

For more information:  
<https://www.Diamond-Consultants.com/TheBook/>

## Preface

# An Invitation to Live Your Best Business Life

Every advisor strives for alignment between their professional goals and values on the one hand and the actual experience of work life on the other.

When you achieve alignment, you have all of this:

- Passion for the work you do.
- Agency over the decisions you make on behalf of your clients.
- The ability to act as a true fiduciary to clients.
- Freedom to spend your days feeling happy, productive, and valued.

The result of finding that congruence is the sweet spot that I call your “best business life.”

As a financial advisor, you hold yourself to the highest standards of integrity, honesty, and credibility. You’ve been successful in your field because you take your professional responsibilities seriously. You’re dedicated to your clients. And you’ve earned their trust. *But are you living your best business life?*

The good news for advisors is that the wealth management world has evolved at a pace far faster than in years past, creating a waterfall of possibilities unlike any you've seen before—and it seems to be growing and changing daily. This evolution has revealed an industry landscape with a plethora of options for advisors, offering varying degrees of freedom, flexibility, and control.

So it would seem that finding your best business life would be easy.

But with more options comes greater confusion—because to effectively assess these alternatives, you need to weigh them against many other factors, starting with your own goals.

It's time to embark on a journey to answer this question:

“Can I say, with absolute certainty, that where I am is still the best place for my clients and me?”

Uncovering the answer starts with asking yourself more probing questions. These will help you gain clarity on your goals and vision; identify the gaps between where you are and where you want to be; and challenge the status quo with courage, honesty, and real self-awareness.

My goal with this book is to provide a strategic thought process and road map to professional self-discovery. I aim to help you ask the right questions and to think critically and objectively about what your best business life looks like—and to help you weigh what's good about your current situation and the ties that bind you against the disruption and hassle that always go along with any change. Only then can you draw your own conclusion—with absolute certainty—that you are or are not in the ideal place for both you and your clients.

There are two things this book is not, however.

First and foremost, it is neither designed nor intended to push advisors into making a move. The mere fact that you are reading these pages indicates you have an interest in exploring not just the landscape, but also your own goals and vision for the future. This does not mean that you will change firms or models. In fact, you may read these pages and conclude, perhaps quickly, that your best choice is to stay right where you are because you've determined that your current situation meets your needs and ethical standards and enables you to do what's best for those you serve. And that's a wonderful outcome, because, even if you stay, the simple act of inquiry will broaden both your perspective and your confidence.

Secondly, this book is not a guide on *how to* transition from one firm to another, should you decide to do so, because the process and details of this are vastly different for each advisor, firm, or model. Certainly, it's something we'd be happy to help you with should you come to the conclusion that a move is in the best interests of yourself, your team, and your clients, but that is not the goal of this book.

Over the past two decades, I've helped countless advisors like you to examine their career options and have guided hundreds toward new firms and models. I've also counseled nearly as many to stay put, because, after going through the process outlined in this book, they determined that they were exactly where they needed to be. Ultimately, I helped each to embrace their best business lives.

But these advisors couldn't get to a final conclusion without answering this fundamental question: Should I stay or should I go?

So let's explore a process that will help you answer that very same question—and find the way to your best business life.

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