The Soul of Your Business

Forging Lasting Relationships for a **Rich** Personal and Professional ***Life***

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Eileen Kerlin Walsh

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INTRODUCTION

The fire cast a dim glow as I woke up one morning. As a small child, living with a consistent chill was the norm. The brisk Irish air battled the dwindling embers. It wasn't necessarily freezing cold, but it was uncomfortable.

I was used to it.

When you grow up in the Irish countryside on a very small farm and are one of 12 children, there is an understanding. I was blissfully unaware at the time, but we were materially poor. Inside this small (Airbnb now calls these spaces "cozy"), our 2-bedroom farmhouse was packed with a close-knit family. Our home had 6 boys, 6 girls, my parents, and a great aunt. The warmth we created was from oil lamps and open fires. We burned the ancient peat we cut from the nearby hills.

In the words of Dolly Parton, "I was rich as I could be" in the raw material that would fuel my life's work.

Imagine a small farmhouse, not at the turn of the century, but in the 70s that had no electricity, no telephone, no television, and no outside influence.

Being disconnected from the world may have made us a bit naïve, but what we lacked in breadth of experience, we made up for in depth.

Looking back on my childhood now, eccentric neighbors, relatives, and an occasional "man of the roads" would gather in our home and weave a tapestry of tall tales. By the fire, they told stories of banshees, illegal whiskey stills, blackthorn fairy rings, brutal oppression, hunger, uprising, and, above all, survival.

It was magical.

Our rural community was small and deeply connected. We attended the same parish school, went to the same church, and shopped in the nearby village. With a community this small, you knew everyone, and they knew you.

My early emersion in a tight community and the appreciation of relationships forged the foundation of who I am today. Most importantly, stories (both fanciful and true) became the building blocks of my personal and professional success and are at the heart of the book you hold in your hands.

As you'll soon discover, relationships and social connections make us happier and healthier. They also create wealth in a wide range of currencies, both tangible and intangible.

Inside these pages, we will look at ways to improve our lives and businesses by forming deeper bonds with prospects, clients, and the people we love.

We will also re-awaken our dormant goals and dreams.

We will explore the science of connection, unity, compassion, and empathy in our brain and nervous system. The science of how we interact will be unlocked so you can live more fully, vibrantly, and build a solid network that can become your net worth.

We will learn how to release, in ourselves and others, reactions that foster love and cooperation, rather than intolerance and adversity.

We will learn to not simply acknowledge our soul but embrace it.

While there are many ways to define soul, I mean the intense essence of a person or institution that contains its emotional and intellectual energy. My definition of soul is that vital, animating force, unlimited by the body. It is, without question, the grandest, deepest part of our being.

We will add to the science of relationships, the role of a story. When you embrace a story, you tap into the heart of loyal, lasting relationships with your team, referral partners, prospects, and clients.

Finally, we will explore your relationship with your loved ones and, equally important, yourself.

I'm also including the enduring *Wheel of Life*, where we will seek poetic balance between a thriving business, robust finances, a happy family, relaxation and fun, a rich cultural life, and continued personal growth.

Does that sound like a tall order?

It can be but follow along and by the time you finish this fast read, you'll realize you have everything you need inside your heart.

PART ONE:

The Role of Lasting Relationships in a Successful, Meaningful Life.

Above all else: Relationships

My parents were hardworking, loving, and fiercely loyal to each other. They lived by themselves into their 90s, in the farmhouse I grew up in. Together for 70 years, they moved in complete symbiosis. No longer farming, my father tended his vegetable patch, and my mother, her children long raised, looked after her hens.

They drank endless cups of tea, and were, to quote the poet Mohineet Kaur, "like seashells, constantly murmuring."

They had their wits about them. However, when either one of them had any health issue or needed to be hospitalized, they both became unmoored. They lost their grip on reality and became ghosts of themselves.

When challenging times passed (and they always do), my parents quickly regained their capacity and came back to us and themselves with their steadfast spirit.

Looking back, I can now see changes are inevitable, but how we deal with those changes requires adaptability and an awareness of others.

What makes a life well lived?

Millennials and Generation Z'ers have been bombarded with so much media, it is difficult for them to say anything that does not include wealth and fame.

Generation X'ers and baby boomers believed it was leaning in, working harder, and achieving more.

Neither is correct.

- Life
- Liberty
- The pursuit of happiness

These are famous words on our declaration of independence, but one key word in that phrase either missing from millennials or overly done by baby boomers is the word "pursuit."

Harvard University started a lifetime study* of adult development 80 years ago.

*https://news.harvard.edu/gazette/story/2017/04/over-nearly-80-years-harvard-study-has-been-showing-how-to-live-a-healthy-and-happy-life/

They started with 724 young men. Sixty of them are still in the study and in their 90s. The article is fascinating to read. And for those of you who want the bottom line, here it is:

> *Good relationships and strong social connections, with family, friends, and community are key to a rich life.*

They found that loneliness is a killer, literally. Isolation makes us unhappy, unhealthy, and causes our brain to decline and die younger. So too is conflict bad for our health.

Also, it's not just the number of friends or a committed relationship that is necessary for a relationship. There are certainly unhealthy relationships where being alone would be a better option.

Rather, it's the quality of close relationships that truly matters.

The Harvard study found it was not cholesterol or weight that predicted how men at 50 were going to grow old but how satisfied they were with their relationships.

Those who work hard to replace colleagues with playmates and stay connected to loved ones are happiest in retirement; not those who made the most money or had prestigious careers.

Warm relationships are good for our health and seem to buffer against the slings and arrows of old age.

Even those with physical pain in good relationships have less emotional pain, less suffering, and less mood alteration than those in bad relationships or no relationship at all

Good relationships do not just protect our bodies, they protect our brains. It turns out, securely attached relationships in our 80s and 90s protect our precious memory.

My parents, surrounded by family and friends, immersed in their community and church, in the heart of the countryside they loved, and stayed sharp and eager towards life. Alone, they melted away. When we lost my mother, in the summer of 2021, my father lived less than a year after her.

Their relationship with each other and their community not only brought joy to all who were fortunate enough to know them, but it also extended their life. Both stayed sharp and eager towards every event of every day.

Their bond was not accidental and was not without effort. Our relationships are the benchmark for the quality of our lives. While this wisdom is as old as the hills, we easily forget it in our quick-fix society. We want prime delivery. We want to binge-watch a series. Our media rewards speed and ignores slow growth.

Creating powerful, meaningful relationships is slow, hard work, but it yields a rich premium that can be had no other way.

PART TWO:

The Science of Relationship and the Key Role of a Story

Empathy

Jenny was single, in her late 40s. She had her three children to raise and was working as a waitress in a truck stop. Jenny never minded the work, but not being around her kids often made her long for a different life.

George was a truck driver, in his early 50s, also single with three grown children. Being on the road was never conducive to building relationships. He was rarely home and when he was, he was too tired to look for love.

After clocking over 2 million miles on the road, George thought he had seen it all. From coast to coast, he'd traveled to every corner of the country. At 52, there aren't not many things that still surprised him.

Then he walked into Jenny's truck stop.

It was like one of those corny scenes in a movie. He instantly thought he was teleported to another world. A content bachelor for over 15 years, even having a thought about "the one" was foreign to him as a calm in a Latin telenovela. The moment he laid eyes on her radiant smile, he wanted to marry her.

Jenny took notice of George but was a bit more guarded. An attractive single mom, as a waitress, she had more than her fair share of flirtatious attention. She had become a bit immune to it over the years, preferring to focus on her kids and her volunteer

work. It didn't take more than a few additional stops on George's route for her to open to him.

Within a year, they were married.

Although they had each raised a family, they knew together they had more to give. They adopted 5 special needs children. As great as their children's needs were, Jenny and George were up to the challenge and the new, blended family thrived.

Like all stories, challenges are often around the corner. Jenny and George were no exception to this rule.

Jenny was scheduled for a simple surgery one day, and it went horribly wrong. She was supposed to simply wake up and walk out of the hospital the same day. Unfortunately, when she woke up, she was given news that made no sense in the clearing fog of anesthesia. "There's been a major complication, Jenny," she was told. "You are paralyzed, and we don't know why."

Most people would buckle under this devastating news.

Jenny and George, however, were neither bitter nor did they waiver in their beliefs. They found the grace to go on. They had children to raise who desperately needed them.

And they had each other.

Their children are all grown now, and Jenny's condition worsens. But even 12 years later, I have never seen her without her radiant smile. Whenever I am in their company, George is holding her hand. They tell me they are blessed beyond measure.

Their story is a testament to the power of love.

Darwin, in *The Descent of Man*, mentions love 95 times and "survival of the fittest" only twice. He said humans are not strong like primates, but their strength lies in having evolved to take care of each other.

Chilean Writer Isabel Allende's story of her beloved daughter Paula speaks movingly to this evolvement. Her daughter suffered a

brain injury, then fell into a coma. Isabel took tender care of Paula in her home, until she died in Isabel's arms, at age 29.

> *"Silent in her bed, my daughter Paula taught me a lesson that is now my mantra: You only have what you give. It's by spending yourself you become rich.*
>
> *When she died, I thought I had lost everything. But then I realized I still had the love I had given her. I don't even know if she was able to receive that love. But I was full of love, and that love keeps growing, and multiplying and giving fruit."*

There are profound reproductive and survival reasons for this phenomenon.

Important parts of our brain and nervous system are shaped by genes to help us connect and cooperate. Love and compassion, all that we label positive because of the effect they have on the body, are scientific.

At its core, love and compassion are hard coded into our DNA.

If we see a behavior in another that we have performed in the past, the same neuron lights up as if we were performing the action. This phenomenon is known as neuron mirroring. It means there is something in the brain that does not distinguish between self and others.

We are neurologically designed to suffer when we see someone else suffer. We should be mindful of taking on too much of the suffering of others.

This can be overwhelming for the minority who suffer from "Weltschmerz," world pain or hypersensitivity disorder. May, a character in my favorite young adult novel, *The Secret Life of Bees*, feels in her heart great love for the world and suffers everyone's pain intensely. Her sisters build a wailing wall, in which she can store scribbled notes of her sadness. This simple transmutation of her pain onto her notes removes the burden from her shoulders.

Don't confuse boundaries with indifference. The line between sympathy and empathy lies in how we manage ourselves as we connect with others.

Simply being aware of neuron mirroring will give you the ability to connect with a person without absorbing their pain.

For most of us, however, mirror neurons simply gear us up to feel, at a primordial level, what another person feels.

As social creatures, we depend on each other for survival and happiness. Therefore, the more love and empathy we feel, the more likely we are to protect and defend each other. The neurochemical oxytocin is a key player in what scientist Paul Zac calls this "Neural Ballet."

Oxytocin

Oxytocin is a sequence of 9 amino acids, produced in the hypothalamus. Oxytocin is produced when we are trusted or shown kindness. Flowing through the bloodstream in high levels, it promotes monogamy, caregiving, cooperation, and generosity.

It does this by enhancing empathy which is our ability to bond and connect with another's experience.

The Vagus Nervous System

The vagus nerve is another rock star in this process of chemically induced emotions.

The vagus nerve is often called the "love nerve" because of its link to a flourishing, meaningful life. The vagus nerve originates in the oldest part of the mammalian brain and is loaded with oxytocin receptors.

When the vagus nerve fires, we feel a rush of elation. Our body is getting us ready for compassion.

I cannot read Isabel Allende's story of caring for her daughter in a coma without feeling a swelling in my chest, a sensation in my throat, and tears welling. I feel touched, humble, and grateful, and my heart opens to love and healing.

Imagine! Simply reading words on a page creates a chemical reaction in our body.

This is described by neuroscientists as "elevation response." If we see humanity suffering, an act of bravery, people helping in a disaster, or hear an inspiring story, we react instinctively. We are equipped for a compassionate response to the trouble of others.

We are born to be egalitarian.

The vagus nerve connects the humanity in us despite our political party, ethnic group, or race.

There are vagal superstars who have increased positive emotions daily. They have a more resilient response to bereavement, have more sympathetic, pro-social children, are trusted more in interactions with strangers, are more altruistic, and have a stronger immune response.

A historical example is Mother Teresa, the Catholic nun, now sainted, who dedicated her life to caring for the destitute and dying in the slums of Calcutta. She set up soup kitchens, leper colonies, and orphanages. She educated the poorest of the poor and fed the homeless. She believed a life not lived for others was not a life.

> *"Spread love everywhere you go. Let no one ever come to you without leaving happier."*

Another example is Mildred Norman, the spiritual teacher, mystic, and activist who became known as Peace Pilgrim. She spent 28 years of her life walking coast to coast across the US and Canada advocating for peace and a more meaningful way of life. Her mission touched thousands of lives.

We as business owners, partners, parents, and friends can be vagal superstars too!

We can improve our vagal profile with meditation, travel, or anything that expands the mind. It is consistently found that reading makes us more empathetic. We get exposed to what Carlos Castaneda calls "the many roomed mansion" beyond the room we were born in.

Community service is another powerful tool to activate your neurochemical machine. Volunteer your time and give from your bounty. It has been said that there is no such thing as true altruism because we cannot give, even anonymously, without getting something back. "You give away bread, it comes back buttered."

Archbishop Desmond Tutu said,

> *"When we serve others, we discover a deep contentment, an ecstasy, that is absent in the opposite."*

The more you have that feeling, the higher your vagal profile.

Not only do you want to be a vagal superstar, but you also want to be able to release that response in your referral partners and prospects.

Devil Cocktail Versus Angel Cocktail

When customers walk in your door, they often have cortisol and adrenaline, not oxytocin or dopamine, flowing through their blood. They may have been stuck in traffic, feel nervous about seeing you, feel reluctant to discuss difficulties, afraid to be vulnerable, and dread the costs.

Cortisol and adrenaline make people intolerant, irritable, narrow, and critical.

It's your task to change your prospect's chemical composition from what David Phillips calls the devil's cocktail to the angel's cocktail. Stories that release not just oxytocin but the other components of the angel cocktail, endorphins, and dopamine.

The Role of a Story

I lost both my parents in the same year.

Because visits to Ireland during their last illness and death punctuated my busy practice, I was often rescheduling, apologizing, and explaining my absence to clients. My pain notwithstanding, I chose to talk about it for the benefit of myself and others. Maybe it was therapy, or maybe I truly believe their lives can still touch others… even you.

My mother grew up in the "hungry thirties." She had a hard life. In my memory, with 12 children, she was always having a baby, cooking, baking, washing clothes by hand, often scolding, and always loving. She said she was happiest when the baby was sleeping in the cradle and clothes were blowing on the line.

JK Rowling said, *"Love as powerful as your mother's for you leaves its own mark. To have been loved so deeply, even though the person who loved you is gone, will give you protection forever."*

She was always in the kitchen and the kitchen was always warm. If ever my mother was not home, the fire out and the kitchen cold, we felt that life had ended. It hardly ever happened, but when it did, we were desolate and lost. Home was our mother and a warm kitchen.

My mother was the heart and soul of our home.

As my mother's health declined, my team managed my practice, and my husband managed his work along with raising our 4 boys, allowing me the gift of being with her.

My mother's faith infused her final days. Our longtime parish priest, as old as her and as sad to see her go as we were, and a young curate who went to school with my nephew, visited her daily, saying prayers for the dying, giving a medieval-sounding plenary indulgence, and last rites.

Her children, grandchildren, and great-grandchildren wove in and out of her bedside, saying rosaries, blessed candles burning. The things my mother gave her life to—faith and family—gave back to her one hundred-fold as she lay dying, peaceful and ready for her eternal reward. It gave us all pause to wonder.

- What do we devote our lives to?
- How will it serve us?
- How will it serve others?

One of my fondest childhood memories was my father's rendition of Robert Service's "The Cremation of Sam McGee." He was most apt to tell it on a Saturday night, with us children gathered around. His voice was layered, deep, and resonant, his timing and pacing hypnotic.

We were transfixed, swept away to the *"arctic trails with their secret tales, that would make your blood run cold."* At my father's wake, we each read a verse in his honor, evoking love and warmth and tearful tenderness, the wash of those words over time and memory as ancient and familiar as all our lives.

We still wake our dead at home in Ireland, a ritual all but gone, replaced by sterile funeral homes and, what Kevin Toolis calls the "industrial death machine." We keep vigil with the body through the long hours of the night, drinking tea, occasionally whiskey, and telling stories laughing and crying.

We never leave the body alone.

On the morning of my parents' funerals, their children, first 6 sons, 6 daughters, grandchildren, neighbors, and friends carried their coffins on their shoulders along narrow winding roads lined with mourners to their burial in our country churchyard.

Clients were kind, patient, and understanding. By sharing my story, my clients, rather than getting irritated by delay, were with me in my grief and loss.

Endorphins

You can release endorphins by making people laugh. When they laugh, they become more creative and relaxed. I often start a presentation by saying, "You have all heard the term 'where there's a will, there's a way.' Well, I am going to rewrite it. Where there is no will, there are way too many relatives looking for money!"

When I invite my guests to try the coffee cake, I tell them I was up all night baking. I tell simple little jokes that break the ice and get us all laughing and comfortable.

Dopamine

Dopamine is created when you tell your listeners an interesting story. Remember your teacher or grandparent reading aloud to you? "Long ago, deep in a forest that clung to the topmost crags of a distant mountain…" Upon hearing those words, you shed your own world and sink into the world of the story.

Attention is increased when you tell a story. Your listener becomes more focused, more motivated, and remembers things in a more positive way.

I often tell clients about my adventures as a trial lawyer by day, a cocktail waitress by night, during my first year of practice. I wanted my school loan paid quickly and get great trial experience, so, for a time, I kept my foot in both worlds. I was a waitress on a casino riverboat and the courthouse was just across from the riverfront. My double life led to many hilarious outcomes.

You pick the story to release the desired effect. Your prospect will bond with you, trust you, and feel generous towards you

The Center for Neuroeconomic Study "hacked" the vagus nerve and oxytocin system to see if people would have the same emotional response to video as in real life.

By testing subjects watching a video, rather than having face-to-face interactions, then drawing blood, they were able to show that character-driven stories consistently cause oxytocin synthesis.

Look how the whole world, a few summers ago, was gripped by, and emotionally invested in, the thrilling rescue of 12 young boys from a cave in Thailand.

It was a warm sunny day. The boys had just won their soccer game and were on a celebratory bike ride with their coach through the countryside. They discovered a cave and decided to explore it.

Little did they know when they entered the cave the events that were about to unfold. Sudden torrential rain sealed the entrance and trapped the boys inside. Volunteers, rescue professionals, doctors, and diving experts traveled from all over the world and worked around the clock to rescue them.

Media covered the drama 24/7. We watched breathlessly as one by one the boys emerged, unharmed.

Real human stories are compelling, stop us in the clamor of world affairs, politics, wars, elections, the stock market, etc., and connect us, teach us compassion, and make us feel more human.

To consistently convert prospective clients, we must master the art of telling stories to our clients and drawing out their needs through their story.

A story is the most reliable method of communicating information, complex ideas, emotions, and experiences and the most powerful way to change mindset, attitudes, behaviors, and beliefs.

It is also the most effective way to motivate, teach, and convince another with our words. Stories make sense and hold attention. They are remembered.

Stories break down walls and influence people. Your clients will respond emotionally to a story in a way they will not to logic and facts.

The seminal text in this field is *Story Proof: The Science Behind the Startling Power of Story* by accomplished researcher and storyteller Kendall Haven.

Haven explores thousands of findings in brain structure, science, and neural technology to determine the importance and necessity of a story to the human mind.

Haven proves our minds are evolutionarily hardwired at least 100,000 years before our birth to think in specific story terms.

These internal neural story maps are not housed in the conscious mind. Rather, they reside in the subconscious so they can be automatically applied to incoming information.

A fascinating concept called neuro-coupling occurs when a story is being told. Neuroscientist Uri Hasson discovered that storytelling causes the neurons in the listener's mind to sync with the neurons of the storyteller.

The brain activates to allow the listener to assimilate the story into their own ideas and experience. The client wants to and will automatically see themselves in the story.

It is said that men see themselves as the action hero in a James Bond film, and women, the heroine or romantic lead, such as Meryl Streep or Jennifer Aniston in a rom-com or drama.

There is a natural path for you to craft the story, so clients recognize themselves and the solution to their problems in it.

You might illustrate how a customer had a great difficulty, how bleak the scenario was, the transformational solution you offered, how the crops were saved, and how everyone was happy with the outcome.

I tell my clients about a tragic accident where a successful businessman in his 50s died suddenly. He left no will and no trust. He had children—an adult, a teenager, and a little baby—from three different stages of his life. He had multiple businesses, buildings, and corporate and personal bank accounts.

Because he had no estate plan in place, probate law had to determine who got his property. The decedent had never divorced the mother of his adult child so she had a key role in the proceedings, including a share of the estate, a result he would never have intended.

Layers of claims kept the estate unresolved for years. Hundreds of thousands of dollars were wasted in litigation. The saga played out in a very public forum, with ugly disputes over paternity front cover news.

My clients shiver, knowing they do not want this mess for their families.

I also tell success stories, where everything comes up roses. Recently, I had clients who were living very humbly on a small, fixed income. Bill was a spendthrift due to mental illness, had a physical disability, and was receiving income-capped state and federal benefits.

Out of the blue, Bill's wife, Maryanne, received an unexpected inheritance from an estranged relative. As pleasant as the surprise was, it left this couple vulnerable to money mismanagement, predators, and loss of benefits.

With good trust planning, we were able to protect Maryanne's inheritance and shield Bill's benefits. We kept their money safe for their lifetimes and ensured it would go to whom they intended after death. Maryanne, who felt burdened by the problems her inheritance presented, was crying tears of joy.

We created trusts for a young widow whose husband was killed in the line of duty. There were significant funds available for the children as they turned 18.

Most 18-year-olds are not capable of making sound, long-term financial decisions, so we created trusts for the children and made Mom co-trustee. This allowed Mom to co-manage the funds and invest wisely. She could help her children get educated and protect

them from creditors and their young selves, as they matured into their twenties.

The more emotionally invested we are, the less critical and observant we become. This is what makes a story such a powerful business tool and why you must use it honestly.

Build a collection of success stories and cautionary tales. Keep them interesting, simple, and easy to follow.

For me, as an estate planning attorney, advance directives and end-of-life decisions are an opportunity for intimacy and shared vulnerability.

Discussions of a client's personal philosophy, faith, skepticism, or belief in miracles naturally taps into the storytelling vein.

I have a host of client perspectives to share, on the pain of making end-of-life decisions for their loved ones and their relief, through planning with me, to take this decision out of their children's hands.

Celebrity deaths, a point of common reference and interest, with a dash of glamour and intrigue, present an opportunity to illustrate excellent or, more often, inadequate planning.

The singer Prince's estate is an example of a disastrous outcome that could have been avoided with an estate plan. Prince had millions in the bank, and a valuable catalog of music that became increasingly valuable after his death. He did not have children, but he had causes close to his heart. He was a devout Jehovah's Witness, and he was passionate about supporting young musical talent.

Everything went to probate court. Prince's sister was not permitted to be his administrator. A costly financial institution was appointed. Scores of people came out of the woodwork claiming to be relatives. A third of the estate was paid in taxes. Nothing went to Prince's favorite causes. Millions of dollars were spent in public

administration in the years that followed Prince's very private death.

The "mess" a grieving family has to confront without proper planning, expensive probate, losing estates to taxes, litigation, claims, and families at war over assets are all fodder for cautionary tales.

By contrast, the smooth, seamless, private, and protected estate administration stories illustrate success.

Embrace stories as a valuable tool for prospect conversion. Add every success and cautionary story you handle, read, or hear about to your collection.

Hone your storytelling art and tools, your eloquence, your command of the language, and your way with words. Use visual language, and draw your listener into the story so they are right there with you by the bedside, at the graveside, or in the courtroom.

You do not have to be a natural. You do not need a pipe, cap, and fireside. This is a skill you can perfect. A great way to improve is to read aloud. If you have young children or grandchildren, you have a ready-made audience to practice with.

An old eloquation trick is to read aloud from Shakespeare, Charles Dickens, or Alexander Pope. The archaic language slows you down, forces you to pronounce and articulate correctly, prevents you from swallowing your words, and helps you speak clearly.

Try Portia's evocative words from *The Merchant of Venice*:

> *The quality of mercy is not strain'd*
> *It droppeth as the gentle rain from heaven*
> *Upon the place beneath. It is twice blest:*
> *It blesseth him that gives, and him that takes*

PART THREE:

Cultivating Relationships with Community, Referral Partners, Clients, and Team

When you master this brilliant life "hack," the science behind relationships and the key role of a story, you can apply it to all areas of your business, particularly your brand.

Keep Phillips' angel's cocktail front of mind as you build a brand that reflects the emotional heart and soul of your business.

Your brand should evoke a set of positive emotions and associations you get credit for.

Nike is a master of the emotional brand. Nike incorporates the age-old tale of a hero pitted against a daunting foe and after a great struggle emerges triumphant. Nike has developed fervent customer loyalty and is one of the most successful companies in the world.

Your brand message becomes more powerful when you weave it into a story, a brand narrative.

Think of the rise and fall and rise of Steve Jobs and how powerfully his personality defined Apple. Oprah and her empire, Gwyneth Paltrow, and GOOP. And again, my hero Dolly Parton, who has built a solid gold, enduring brand around her tart-with-a-heart rags to riches story.

Your brand message is your firm's hopes and dreams, principles, and aspirations. Your brand story then will carry that message to your clients and whisper "join us."

Potential clients see themselves in your story and foresee a better self through your offerings. They are motivated to join your

community of believers where everyone shares tastes, preferences, and values.

You, your team, your clients, your community, family, and pets are all stakeholders in the brand's success.

- Your stories must be simple.
- Your stories should be easy to follow.
- Your stories must evoke emotion.

Above all else, make sure your stories are tailored to your target audience. Make them nod their head, shed a tear, or smile.

Your brand story will not sound like a marketing message (even though your message should be woven in). I liken this brand narrative to a ministry where you are the leader, burning with passion, purpose, and creating the energy that compels others to follow.

People want to matter, and they want their lives to have meaning, to be part of something bigger than themselves. They want to be part of something important. Regardless of our desire to lead, we all have an equally strong desire to belong.

We must never lose sight of the fact that the story is for them. Ultimately, they want their own problems solved.

Even though you start with your challenges, you must emanate success so powerfully they are attracted to you. When you share your "hero's journey," it is OK to be the hero; to be portrayed as Luke Skywalker. However, when it comes to your marketing, it is wiser to be Obi-Won, where you are seen as the guide for your hero …your audience.

You'll be better served when you position your audience as the hero.

When you deliver your story in this manner, they will remain loyal, give testimony, and advocate for you to their friends, family, and neighbors by encouraging others they care about to join your orbit.

There is no one story more valuable than another. A story is the great, democratic equalizer. It's how you tell it and how you weave your message through it that is key.

- Where or how did you grow up?
- What did you do before you started your business?
- Why did you start your business?
- What are your hobbies?
- Why does any of this matter?

The story must always drive your brand message home. Tell relevant stories about your single life, marriage, children, divorce, immigration, discrimination, faith, glass ceiling, illness, or your survival story.

If you lost everything you had, if you were stripped of all your trimmings, you would still have your brand story. Guard it fiercely, and brand everything you do with it. It's what makes you unique!

Earlier in this book, I gave a short version of my origin story. I painted the picture of growing up on a small farm, before electricity and indoor plumbing. I shared a taste of a simple country girl who made good in the bright lights/big city.

In my next book, (already in the works, so stay tuned!) I tell my warrior to healer story. I share how I enjoyed my time as a trial attorney with all its humor and drama. But when I discovered estate planning, I found my true home, in the healing law.

In this soon-to-be-released book, you'll hear about my re-invention story, my American dream; how I started my education at age 4 in a one-room schoolhouse, nicknamed "the henhouse" because it was little more than a hut. And, what took years, but seemed like moments, I went on to study at some of the world's finest universities.

I tell my loving-kindness story. I tell my clients that I love them, that I know how difficult it is to talk about money, estrangement, special needs, addiction, illness, and death. I understand why they

put estate planning off, then reassure them we have a solution to every problem they have, here in the healing law.

I tell my clients that I love them.

I know from experience how difficult it is to talk about money, estrangement, special needs, addiction, illness, and death. I completely understand why they put off estate planning. One of my primary roles is to reassure them that in the healing law we have a solution to every problem they have.

You'll hear my love story, too. How, through my twenties and early thirties, true love eluded me. My friends and classmates fell naturally into engagement, marriage, and babies, but that path never unfolded for me. While it's not an uncommon path, you'll travel with me as I ponder self-esteem and purpose and explore how making a small shift in perspective can create a wonderful life.

Despite my loneliness, I was grateful for the riches I had, my education, profession, and health. I share the meaning behind my beloved family, some very dear friends, and a journey to financial and emotional independence.

Eventually, I made peace with my lot, determining I would have my longed-for baby single and perhaps meet a philosophy professor for companionship in later life.

Out of the blue, my practical sister, (who rolled her eyes at my dating choices), said, "There is this man I know, he is really nice. I think you should meet him…" At this point in my life, like the awkward blind dates you see in movies, I was skeptical.

I was also wrong.

The rest is history.

And finally, I share my company story, how I went from a kitchen table practice with toddlers at my feet to the beautiful offices, employees who are like family, and the life-affirming practice I have today.

I brand with my everywoman story; how to balance a happy marriage, successful practice, healthy children, service to humanity, and still be home in time for tea!

Your brand story is never fully told, of course. You must keep rewriting and evolving in business and in life. A friend once teasingly asked how I would brand myself when my children were raised. Without missing a beat, I said "my grandchildren!"

Anatomy of a Brand: Kerlin Walsh Law

https://kerlinwalshlaw.com/

Harvard University Business School did a research project in 2010, (led by Amy Cuddy, before her TED talk fame), and determined that two critical variables account for our overall judgment of others: warmth and competence. Click here to read it.

You don't have to quote experts like Amy Cuddy, but you do need to stand for something and have a clear passion and purpose your audience will become attracted to.

A client expressed this exact sentiment to me; that my practice emanated the qualities of warmth and competence. So, I ran with it, and made it my tagline and shorthand for my brand.

Competence

Competence is necessary for your brand but it's easy to pin down. All business owners must possess skill, knowledge, professionalism, experience, and expertise to be successful. These qualities are inherent in every client's expectation. You have got to have the goods. However, it's the more subtle aspects of branding that differentiate you.

Warmth

In hearing me speak and reading my columns and marketing materials, clients perceive my voice as genuine, they perceive that I love them, that I will listen to them, and that I will not rush them. We can laugh and cry together, and I will lay to rest their fears and doubts. They trust that I care about their life's meaning and purpose, that I respect their dignity, will grant their wishes, and remember them.

There is a scene in the AMC series *Madmen* that captures this coveted, elusive connection so beautifully I recommend everyone watch it. You can find it on YouTube under "The Carousel." Don Draper says:

> *"There is the rare occasion when the public can be engaged on a level beyond flash, when they form a sentimental bond with the product, a bond deeper than lotion for an itch, a nostalgia, delicate but potent, like the pain from an old wound, a twinge far more powerful than memory alone, taking us to a place we ache to go again, home again, a place where we know we are loved."*

That's the feeling you want to capture with your brand, that your business meets their powerful need to be loved, to come home again.

We are in a tremendously privileged position as we sit with clients, telling us problems, sharing secrets, and fears. We can use the opportunity to motivate and inspire and make them feel better about their lives, family, and future.

Back Pocket Skills

https://www.backpocketskills.com/

When I taught law, I subscribed to the "Last Lecture" tradition. On the final day of class, I would summon the wisdom I had gleaned on living a peaceful, successful, happy life, and share with my students as they headed out into the world.

From those last lectures, I developed a 9-step motivational program, "Back Pocket Skills: How to Live Well, Love Life and Get What You Want."

Skills No. 1 through No. 5 in this program are straightforward; be eternally grateful, get rid of blame, recognize your unique potential, expect nothing less than the success you seek, create a first-class vision for your life, and keep it alive with action and energy. This is a winning formula and practiced diligently, cannot fail.

- What if, on your way to meeting your goals, a massive roadblock shows up?
- What do you think, say, and do when the economy turns upside down?
- How do you react if you or someone you loved receives a devastating diagnosis?
- How does your world change when someone in your life gets sick and dies?

Skills No. 6 and No. 7 will save you when things come apart and you must look beyond your winning formula. Learning to recognize the "lights and shadows" in everything, in failure and loss as well as success and achievement is truly transformative. You will never look at a circumstance as all good or all bad again.

When you fully accept there are no "absolutes," not all black or white, ultimate right or wrong, you can come away from attachment to a particular result.

And that leads to banishment of your greatest enemies, fear, and worry. This is a tremendously liberating concept. With fear and worry out of the picture, nothing can stand in your way. You are truly ready to soar.

The last two skills, No. 8, and No. 9 are the icing on the cake, the capstone of my education and I hope yours. They will help you live in love, kindness, awe, and wonder. You'll not find but create deep, abiding joy. These last two skills will teach you how, "on this bright day of frost and sun, to not sleep before evening."

When appropriate, I share this work with my clients, from the perspective we are all on the same journey, have the same longings, and ask the same questions. I share the answers that have worked for me and the stories and sources that lead me to them.

That gift, when the need for uplift is great, comes back to me ten thousand-fold; in goodwill, legal fees, surprised and delighted clients, loyalty, and long-term referrals.

If clients leave your presence feeling more grateful, less resentful, less fearful, more loving and loved, kinder, inspired to action, happy to be alive, and full of hope for the future, they are going to shout from the rooftops, bring their friends and families and neighbors in to share the positive experience.

Brand Emersion Through Powerful Marketing Tools

My greatest takeaway from 20 years of practice is to prioritize the marketing budget. That was my challenge, to put marketing first, not last.

Your craft, competence, education, experience, staff, procedures, etc., are only half the story! Branding, sales, and marketing are just as important.

Before you market, use your likes and dislikes, your successes, and failures to pinpoint with military precision, your business sweet spot.

Do the math, graph how complex the area of business is, cost of customer acquisition, how long service takes from start to finish, how much expertise your staff need, risk exposure, how well it's compensated, and how much the customer loves the work and understands it. Then …all your marketing efforts should be targeted towards this customer.

For me, it's high net worth but not ultra-high; large enough to justify sophisticated succession planning with minimal tax planning.

I have further carved out blended family planning and pet trusts. It's terrific to find niche areas that no one else is marketing to and align them with your brand.

Hyper local also works for me. My practice catchment area is not outwardly affluent, but it is chock full of *The Millionaire Next Door* of Stanley and Danko's popular book. I can meet my goals every month by marketing to these clients and their financial planners, alone.

Every year, instead of a snow-swept winter scene, my family recreates a classic movie poster for our Christmas card, and I mail it to thousands of existing and potential clients and referral partners. The positive reaction is overwhelming. I get comments and responses all year long.

Click here to read a few.

That card is as good as a "let's review your estate plan" letter or a referral solicitation because it reminds them we are here, and more specifically, it evokes the brand story they want to become, or remain, part of.

Have all your marketing vehicles branded with your story. If your company offers a generic newsletter—personalize it. Be careful with your subject line. If it does not entice and create emotion, the reader will never get to your content. Add the causes you support when appropriate. It always helps to be timely and relevant. Be mindful of holidays, seasons, celebrations, and successes. A little self-revelation goes a long way.

Live Events

I cannot emphasize enough the importance of getting yourself to the front of the room. It's simply the best way to get your brand stories out to your audience. You can showcase your authentic voice, persuade, inspire, and win the hearts and minds of your audience.

Do this authentically, and they will wrap their arms around you.

Public speaking is a proven way to rise to the top of your profession, yet only 10% of professionals speak about their craft, and only 2% of those who do, develop mastery.

You can host your own event, MC an event, plan a joint venture, or be the keynote speaker for an organization. You don't have to be a one-trick pony. I speak on estate planning, storytelling, motivation, inspiration, success in business, woman empowerment, or a particular subject the organization wants. All are positive extensions of my brand.

Service to Humanity

Donating time, money, services, and expertise to charitable and educational initiatives are powerful ways to increase your influence in your target community.

Be careful that each position you accept fits with your overall business strategy. Watch your time commitment, and keep the causes you support aligned with your brand.

Publishing and Print Media

Write a column to establish your expertise. There is always room for interesting content. Do not turn it into an advertisement unless it is 100% storified. Have articles written about you at every opportunity. My most successful effort is a column/ad combination. My assistant will say, "'Shared News' must have come out today because the phone is ringing." It's that reliable.

You can also join HARO's mailing list for opportunities to contribute articles and interviews to regional and national publications and TV stations. HARO stands for "Help a Reporter Out" and the organization mails twice daily a list of subjects journalists are developing and require expertise on. Qwoted is a

similar feed service in which you can tailor topics to your area of interest.

Broadcast Media

I've had great success with cable access TV shows. My business was featured a few times by my local Channel 4, and I got to know the producer. I then negotiated my own show.

Over the years, I've had legal shows, business shows, and chat shows. It doesn't matter what I'm talking about, I bring the audience back to my brand and my office.

My network organically grows as a result.

I've recently rebranded my show to *Where the Road Rises: Law. Lessons. Legacy.* This format allows me to draw on my work in law, inspiration, and storytelling which all align with my brand message.

https://www.wheretheroadrises.com/

"Where the road rises" is a verse from an old Irish prayer that suggests when all things are aligned and the road rises to meet you, the result is harmony and fulfillment.

A condition of the contract municipalities have with cable providers is consumer access to the airwaves so there is not a huge bar to getting a show up and running. Sell it to them, make it easy for them, tell them you will do all the work, and give them great content!

Your focus must, of course, be education—not promotion. With a focus on serving, storytelling, and actionable content, you will quickly become a trusted source and community influencer.

Bridging the Gap

As business owners, we often find it hard to let our guard down. To not appear weak and vulnerable, we often project an aura of detached professionalism rather than emotional connection.

However, with the right balance, the emotional approach is the more powerful method.

I recently gained a megachurch as a client that has thousands of lawyers in its congregation, but they chose my office because they liked my brand story. Create a warm bath of emotional connection and shared vulnerability.

You can punch above your weight.

Our success in meeting client needs often requires discussion of intimate subjects, which calls for a tender, sensitive approach. This is true not only for a high-touch, 100% service business like mine, but even a product-based company does better with professional vulnerability.

Your ability to exude confidence with an emotional origin story is the magic recipe for even something as simple as a pair of socks.

In 2013, Randy Goldberg and David Heath learned that socks are the most requested clothing item in homeless shelters.

They established the brand's mission to donate one pair of socks for every pair purchased.

They launched a crowdfunding campaign in 2013 and raised a respectable $145,000. A year later, the company raised $1 million in seed funding from friends and family.

The very next year, the founders appeared on ABC's *Shark Tank* and secured a deal with Daymond John. From there, the company became not only popular but profitable. Unwavering in the mission to serve and be authentic with their brand (these socks are expensive!) by 2018, the company exceeded $100 million in revenue.

By April 2020, Bombas had donated 35 million pairs of socks.

I'd like to see business owners adopt a movement like a medical narrative. Consider ourselves solution-based professionals. We can become business or personal "doctors" who unlock patient needs from their stories. Like a diagnosis that takes information from the body and the mind, when we not only listen to our clients' pain but the story behind it, we can always serve them better.

The master of the medical narrative, Oliver Sacks, cared for the indigent, homeless, and mentally ill in New York in the 1960s, when no one else much cared about their stories.

Read anything by Oliver Sacks and you will be brought to your knees. I read one of his last essays, "The Sabbath," before important speaking engagements to cut through the minutiae and get to the heart of my subject, to get my oxytocin flowing.

> *"And now, weak, short of breath, my once firm muscles melted away by cancer, I find my thoughts increasing, not on the supernatural or spiritual, but on what is meant by living a good and worthwhile life—achieving a sense of peace within oneself.*
>
> *I find my thoughts drifting to the Sabbath, the day of rest, the seventh day of the week, and perhaps the seventh day of one's life as well, when one can feel that one's work is done, and one may, in good conscience, rest."*

Developing legal narrative is something of a personal crusade. Clients can share complex emotions and experiences about their life, their family, their assets, and the behaviors that connect them, in the context of legal narrative.

We can learn more about the client from the way they tell the story than from the story itself. They will have a more memorable, satisfying experience with you, with better outcomes for you both.

After years of consultation, we become experts on the human condition, the basic personality types, reading between the lines, picking up what our clients are not saying, recognizing the social worldview their needs are filtered through, and we can respond directly to it.

Narrative law humanizes law. And it makes the practice rich. We are in the confessional. We have this rare opportunity to listen, we have the cloak of education and respectability that society bestows upon the top professions, and we can heal with it.

I have attended many deathbeds. While it is always a somber experience, it is also a unique privilege to listen to stories, offer solace and peace, and make someone feel special and heard in their final days.

I created a will for a middle-aged man as his elderly mother wrapped his skeletal body in blankets like a child. Like all parents and children, this final chapter was not the order they thought their deaths would be in.

I created virtual estate plans for stunned couples during the pandemic, losing each other days apart, alone, their grief-stricken children not allowed to visit either one. For a doctor who treated COVID patients day and night for 11 months in 2020, then quickly succumbed to the disease himself.

Imagine the emotion of creating a trust for a pregnant woman. I created deathbed trusts for several young mothers with terminal cancer. Here they were, in their last days, discussing a child they would never see.

To not experience that first step or the smile of a toddler was devastating. These moms would never see their children's graduation, their weddings, or their grandchildren. They would never rejoice in the growth of their children to young adults.

They would miss everything.

Curiously, the bravery and stoicism these women showed were beyond inspiring. They laid there, bravely planning their children's future, a future that had been coldly snatched from them. In each case, their grace, amidst their sadness, was profound.

There is room for nothing at a deathbed but loving kindness.

To have a business and serve the public is a true honor. Never take it for granted. If you are in danger of doing so, step out and rediscover it.

I recently asked a 94-year-old woman about her time in the Woman's Auxiliary Corp in World War II. She told me the young women had so much fun! They would go off flying with the pilots on little jaunts. One time, she left her good overcoat on the plane. Her mother was more concerned about the lost coat than her daughter taking unauthorized flights with trainee pilots. She said no one had asked her about the war in 50 years.

I went to the home of a dying fireman recently. Having seen more than his share of destruction, emotional turmoil, and tragic death, he was a bit grumpy. One might even say he was bitter, angry, or resentful. One thing was certain.

He did not trust lawyers.

During our discussion, I listened to him complain about my industry. He was shocked at the investment for an estate plan. After a while, I said, "I bet you have some great stories."

He transformed before my eyes.

He glowed as he told me how much he loved being a fireman, using "the jaws of life" to cut victims from car wrecks, and his sadness that his career was cut short by an accident in which he was wounded, and his partner killed.

I tell my clients their story is their most important gift, and, for a short time, I get to be part of it.

If you nurture a brand narrative approach, the quality of your sale will go further. I often think we business owners are the fish that must swim constantly to keep oxygen-rich water flowing over our gills, even while we are sleeping. The reality is we must keep generating business and every ecstatic client leads to those vital referrals.

The Ultimate Brand Story: The Ethical Will or Legacy Letter

https://www.sharemylegacy.com/

In addition to drawing out clients' stories to unwrap their needs, you can teach them to pass on their stories in an ethical will.

An ethical will, more commonly called a legacy letter, is a wonderful document on the meaning and purpose of your life. It is a pilgrimage to self, a gathering of the stories that made you who you are and taught you what you believe. The intent is to gift your reflections to those coming after—your children, grandchildren, church, community, and the world.

A legacy letter is your unique alchemy of mission, memoir, and inspirational guide. The value of writing one is twofold: The process is healing and transformative for you and leaves a priceless gift for your family. It captures forever your place in history and enriches the lives of your readers.

Storytelling Is Healing

Few lives are rose-strewn pathways. Many of us have regret and sadness about the past. But there is no healing in silence or shame. Secrets affect everyone in the family negatively.

Telling your story can lay ghosts to rest.

The incident may be less significant now than when it happened. Times have changed. Families are more accepting and often more merciful than we think. The passage of years, maturity, and self-compassion can help bathe the incident in a new and forgiving light.

Plus, that difficult situation may help others in the same bind. Your story could save some frightened young person's life.

Stories Are Fascinating

Everyone loves a great story, especially family stories. A story passed from one generation to another strengthens the link of shared meaning.

Stories educate us, enlighten us, and return us to ourselves differently than we were before. When we get caught up in our professional lives, career advancement, building our assets, raising our families, and planning for the future, we are tactical. Stories keep our hearts open to love and beauty. They remind us we are more than objects of utility.

Stories take us on a journey of self-discovery.

Stories Are Life Affirming

I have learned, through my work as a lawyer and a teacher, that everyone wants to be validated, feel relevant, be remembered, and be heard.

I have also learned that when we are encouraged to write, given the tools to do so, and a safe environment to share, we all have eloquence, truth, courage, and power in our stories.

Stories Are Timeless

Markets and technologies change, but human desires remain the same. From cave paintings, hieroglyphics, and Shakespeare to Facebook, people have looked to art to instruct and inspire their lives.

How much more relevant if your family has your words! The value of what you write is greater than Shakespeare for you are their own flesh and blood.

Your story illuminates theirs. Your words are a link between the past and future generations, a gift sent back through time. Your words could furnish them with armor, a shield, or, in the words of

John O'Donohue, "a cloak to mind their life." Your unique link will be lost if you do not write it down.

Your story is, by far, the most valuable gift you must give. When people know that my work is estate planning, they sometimes tell me they have nothing to leave. I tell them, "Oh yes you have!" I tell them their story is more valuable than money or property.

In the pages of your legacy letter, you take center stage. Most of us move through life and death with little recognition, with no idea how special our story is. We absorb daily the lives of celebrities, politicians, and reality stars. We read, listen, and voice the stories of others. This is finally our moment to shine.

Your story is the window to your soul. Your words are jewels, important enough to be written and shared. We each have a unique contribution to make to what Sandra Cisneros calls "the chorus of voices, brave, heartbreaking, beautiful."

Your story matters. Your big moments, small moments, special moments, awful moments, and the moments that changed everything. The world as you found it and the world as you leave it.

Your story survives. No matter what has been taken from you, your marriage, your home, your loved one, or your breast, your story remains. No one can take your story. Through your story, you transcend time and mortality and survive even death.

My mission to teach everyone the value of their story is one I come by honestly, in my Irish country childhood. Stories were revered. Not just because we were good at telling them but because they were all we had. And they were often the only thing we had to pass down.

When I became an estate planning lawyer, I heard stories daily. My clients had incredible legacy beyond their possessions. They came out of the kitchen, burned their bras, went to war, built business, and lived through tumultuous times and tremendous changes.

I was fascinated by these stories. I knew they were as integral to my clients' legacy as their material wealth. Since 2006, I have been teaching my clients to write a legacy letter and leave it as a gift for those coming after them.

I have developed a beautiful online tutorial and workbook to help clients write their legacy letter easily.

The program guides the writer step by step through memories, values, beliefs, gratitude, pearls of wisdom, hopes, and blessings.

I supply writing prompts and samples, quotes, and suggestions. You cannot get lost, bogged down, or overwhelmed. I limit how much you write for each section. This can be frustrating when memories are flowing, but it is essential you keep moving through the process.

I highly recommend you write your own legacy letter and introduce them to your family, friends, colleagues, and customers. Doing so reinforces the brand message that you care about them over and above fees and services. You gain their deepest loyalty, as well as everyone in their sphere of influence, for life.

https://www.sharemylegacy.com/

Trust Your Own Experience

It's important that you trust your own experience, in both your brand stories and illustration. Encourage clients to trust their experience too. I had a profound lesson in this concept recently.

Earlier this year, I was invited to present a series of lectures on writing in The Seamus Heaney Homeplace in Ireland.

Seamus Heaney, recently deceased, is a poet who won the Nobel Prize for Literature in 1995. He grew up close to where I grew up in County Derry, Northern Ireland, and he is our pride and joy.

In addition to his literary translations and academic research, Seamus Heaney wrote of the local, rural, and domestic. His poems

are stark and spare, yet luminous and brilliant.

I have always loved Seamus Heaney's poems, not just for their lyrical beauty but for their existence. I was shocked that the people and places of my humble childhood and simple landscape were worthy of verse and praise.

Shocked that a rural Catholic from a large family, poor stony farm, cutting turf for the fire, exactly like me, was celebrated, not just as the village bard but by the world of letters, Oxford, and Harvard, by the other great writers of his time and finally, received the ultimate validation, the Nobel prize!

By acknowledging his work, these esteemed institutions ratified my existence, which otherwise felt a little shameful.

Absorbing the exhibition of Seamus Heaney's life, literature, and inspiration, I was struck by two things. Not just the cadence of his speech and the power of his work. But by what he had to teach us as writers, business owners, storytellers, speakers, and presenters.

He showed us that our own experience is trustworthy. He urged us to share our personal memories, not just to preserve them, but to open the experiences, move them along, and make them current.

So, I encourage all of us to trust our experience, let the stories of our childhood, teenage years, adulthood, college, business, our tragedies, and triumph connect to and illuminate our present and move us along to "a glimpse of wholeness."

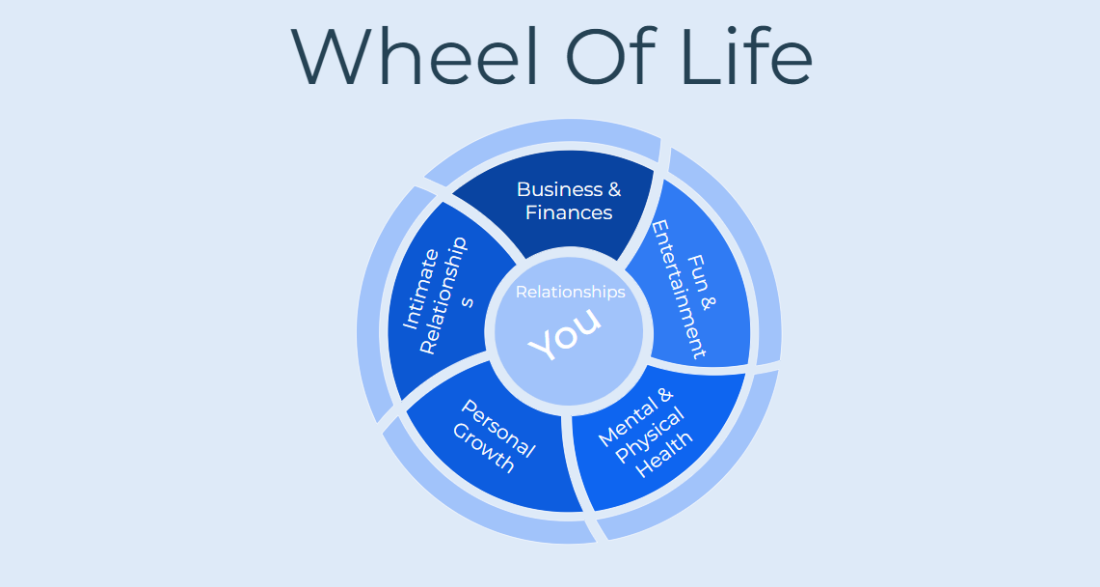
"Walk on air, against your better judgement."

—Seamus Heaney

PART FOUR:

Deepening Relationships with Your Loved One and Yourself

The Wheel of Life



The ancient wheel of life is a good model for balance and a reminder to nurture all the components of our ideal life, not just one or two.

Business owners are at risk for fatigue, divorce, loneliness, and addiction. There is the sheer volume of work and the steep learning curve of establishing a successful company. So, it is crucial to maintain a healthy balance in your life.

Mental & Physical Health

Eat healthily, sleep well, and get at least 15 minutes of exercise a day. If you have been meaning to take a yoga class, do it. Make your

doctor appointments and keep them!

"There is more to health than not being sick."

I have written often about compassion in this book. Jack Kornfield said, "Your compassion is not complete until it includes yourself." To be confident and engaging, you must be secure within. Do whatever you need to keep yourself emotionally and spiritually on track.

Listen to success, motivational and inspirational books, and podcasts at every opportunity.

Audible is my secret! I am listening to a book on business success or personal growth, a novel, or a memoir all the time, as I get ready for work, drive, and put away laundry.

With Bluetooth in most cars, you can slide right from your phone to the car sound system without even pressing a button. Wisdom and knowledge on tap! I love it.

People with religious faith never stop attending worship, reading their book of wisdom, praying, and listening to inspirational music, just because they believe. They are never done; neither should we be!

Business & Finances

And professionally, there is no resting on your laurels! Continually fine tune your competence, attend seminars and workshops. Join professional groups, join, or start a success team. Join a peer group, like Vistage, or an industry specific one, or a business advisory group. Keep each other motivated and shore each other up. Never stop learning and growing.

Consider a business coach. I hired Jean Kuhn as my business strategist in 2020, when the pandemic had thrown us all into uncertainty, and I have never looked back.

Jean provides tailored support and finely tuned resources. She is my accountability partner and greatest cheerleader. She keeps me focused on a granular level, daily. She helps me grow, personally and professionally. Since working with Jean, my results have been explosive.

I doubled my revenue.

https://jeankuhn.com/

Have monthly, quarterly, and annual reviews of your performance. Consider designing a strategic plan so everyone is on board with your business mission, story, vision, and future direction.

I asked a woman once who had her own successful business, ran a million-dollar network group, was expecting twins, and running for Congress how she did it. She said, "I focus on my core genius and delegate the rest."

I remind myself of those words, daily. This philosophy will keep you working "on" not "in" your business.

A colleague is fond of saying, "It's my job to bring the work into the office, it's their job to get it out of the office." A little cruder perhaps but the message is clear.

Hire smart, kind, hardworking, and self-directed people with soft skills and big picture thinking. Hire slow, fire fast.

Keep your team happy, include them in your firm story, and be generous with time off. An extra week of paid vacation is relatively inexpensive and is deeply appreciated! My personal standard is no one cries in our washroom.

Lead, set the tone, inspire, and motivate to advance your mission and vision. Make sure everyone is invested in your business success.

Think laterally. The pandemic presented my law firm with huge logistical challenges, but also opportunity. People recognized their vulnerability and need for estate planning, but they also wanted to

stay safe. We stretched and found creative ways for clients to complete their plans. We video-conferenced, and witnessed documents on porches, in hospital foyers, through windows, in driveways, and in the rain. Our clients were delighted, and business boomed.

Keep your premises clean, tidy, warm, and welcoming. Add personal touches. I have an ornate photo frame we place in our conference room for each appointment. "Welcome John and Mary, we are so glad you are here." My clients love it.

As you build your business, make sure you are saving for retirement. Many small business owners without a 401K plan neglect to do so.

To make sure my retirement fund never takes a back seat, I have a dedicated revenue stream from an attorney panel program I participate in, which exists only for my investments, savings, boys tuition, and retirement. It cannot be tapped for office needs. I found that was the only way to keep it sacrosanct. Treat your contribution as if you were an employee, rather than the CEO.

For those of you in your early years of business, learn from and emulate your wealthy client strategies. Coming from a poor farming background and a country with a socialized pension, I had zero guidance for future planning. I developed my financial savvy from my clients and referral partners.

If your finances are not in good shape, or you have no retirement vehicle in place, pick a financial planner, confess, and ask for their help to get you on track.

Sometimes, it's not just sloppy spending habits that sabotage us, but the absence of a wealth mindset. One of the best books I have read on this subject is T. Harv. Eker's *Secrets of the Millionaire Mind*. Eker demystifies why some of us easily accumulate wealth, yet others struggle to get out the gate. This book will truly change your thinking and your results forever.

A mentor I had early in my career was fond of saying time and money are balloons. If you harness them, they will stay with you. If you do not, they float off into the ether.

"The morning breeze has secrets to tell you, do not go back to sleep"

—Rumi

I was named one of the 20 Most Inspiring Women of 2022 by The Woman Leader's Magazine. They asked me to name my superpower. I said if I had to name one thing, it would be the early morning.

I videoconference with my business coach and other like-minded professionals at 5:00am each morning, Monday through Friday. We discuss our wins from the day before and strategize for the day ahead. In addition to goals we want to accomplish, we set an intention for the day—gratitude, focus, staying in the moment, etc. I often get on the call sleepily, longing for my soft pillow, then hop off 30 minutes later, energized, and ready to soar.

Intimate Relationships

The more closely we are connected to the people we love, family and friends, the happier we feel and the more personal satisfaction we have in our lives.

These important relationships also include the communities we belong to, (such as sports, hobbies, and religious groups). The loss of our community interaction and get-togethers was particularly devastating during the pandemic.

Forming a sense of belonging with other people around a shared mission or identity is a major contributor to our sense of meaning and well-being in life.

Nurture and reinvigorate the groups and organizations you belong to. Such communities can lift us when we are down and give us

capacity to deal with any trouble that comes our way.

Creating and maintaining personal relationships is, however, hard work. You must make a conscious effort to schedule time, be present, show appreciation, show affection, be present, listen, apologize, and forgive.

I once heard a high-profile divorce attorney speak at his 50th wedding anniversary celebration. A guest asked how he managed to stay happily married when he dealt with crumbling marriages all day long. He said his secret was to "Give in early and often. This, too, is giving."

Those words had a profound effect on me. From that moment on, I viewed "giving in" on decisions with my partner, my children, or my colleagues as a form of giving and of strength. This has led to more successful and happier relationships in my life.

Fun and Entertainment.

Schedule time off in your calendar. Go on date nights, go to the symphony, theatre, film, lecture at a university, or a reading at the bookstore.

Get into the great wide open, go to the coast, the lake, or go on vacation! See the world. Travel relieves stress, recharges your batteries, changes the pattern of your days, and draws you closer to your family. Away from distractions, travel will renew your mental and physical strength, help you rediscover yourself, and increase productivity when you get back.

Personal Growth

I am a devout believer in what philosophers have been teaching since the dawn of time: We become what we think about. That what we plant in our minds will grow, be it nourishment or poison. Therefore, I commit myself daily to focusing only on what is good for my business and family.

At the close of each year, I write down what I am most grateful for that year and my aspirations for the upcoming year and tuck it away with my Christmas decorations. Each December, I am amazed afresh at how my goals and dreams come to fruition.

- Do you know what your purpose is?
- Have you achieved it or has that day not yet broken?
- What pulls at your heart and stirs your soul?

I hear my friends tell their children to aim for the stars, go for their dreams, and you can do anything you want, but they have forgotten that still applies to themselves.

If you have an unfulfilled goal or dream, go after it. Barbara Sher says, *"if you love it, that's a message from your DNA you must have it."* Wanting it is a good indicator you will be good at it.

What I have learned from facilitating success teams is that everyone is happiest and most alive when they are cultivating their own garden, whatever that may be.

Even if you have hit all the goals you set in life, and like Philip Roth retiring from writing, you are ready for the "struggle to be over," you can still wake up in a world full of stimulating ideas and fun.

We often focus our retirement thoughts on money, but that is only the tip of the iceberg. What does that money represent? What does it do for you and your family?

Plan for retirement beyond money.

- Where do you want to live?
- What do you want to do?
- Why do you want to do it?

As we indicated at the beginning of this book, those who flourish in retirement still have passion and purpose, a reason to get up and out of the house every day. You can have a whole 2nd, 3rd, or 4th act ahead of you!

Delight your brain with fascinating glimpses into new worlds. Do things that fill your heart with joy, make you think, and make you laugh. Go to workshops, retreats, and join an intellectual community. Do those things intentionally, and you can savor the richness of life every day. You can make others want to be around you when you live the truth that you are glad to be alive!

You can find purpose by sharing your wisdom and vision. You can create mutually beneficial relationships by mentoring, coaching, or teaching a class. With what you have right now, you can teach at a college, church, library, or community center. Hold the door open for those coming after you.

This engagement will keep you, like the Harvard study participants, vibrant through your later decades.

Conclusion

In our fractured world, we all remain hungry for stories and connection. If you grow your client base around the art of storytelling, learn to release the chemicals that foster love and compassion, you will tap into your customer's longing to connect. You will become validated, remembered, and heard. When you do that, your business becomes limitless.

In my marketing bio, I tell my prospective clients:

> *"Estate planning is about protecting your assets, your loved ones, and planning for the future, yes, but it is so much more...It is about you, your unique story, your life's savings, your values and beliefs, and your hopes for the future. That is what I weave into your estate plan."*

If everything about you and your business is honest and authentic, if you hold a promise of respite, solutions, success, peace, and happiness, your ideal customers will want to become a part of that. They will want a glittering chip of the energy you create.

And they will pay you handsomely for it.

May the blessings of Irish priest, poet, and philosopher John O'Donohue rain upon you.

On the day when
The weight deadens
On your shoulders
And you stumble,
May the clay dance
To balance you.

And when your eyes
Freeze behind
The grey window
And the ghost of loss
Gets into you,
May a flock of colors,
Indigo, red, green,
And azure blue,
Come to awaken in you
A meadow of delight.
When the canvas frays
In the currach of thought
And a stain of ocean
Blackens beneath you,
May there come across the waters
A path of yellow moonlight
To bring you safely home.

May the nourishment of the earth be yours,
May the clarity of light be yours,
May the fluency of the ocean be yours,
May the protection of the ancestors be yours.

And so may a slow
Wind works these words
Of love around you,

An invisible cloak
To mind your life.

Document your story and the importance of your journey for yourself. Then, use your story to serve others. Your life becomes a lesson for yourself, your clients, your friends, your family, and those coming after you.

This poem, to me, sums up the blessings of our beautiful broken lives and how others will learn from our stories.

Tell them.

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For an in-depth journey to create your own legacy letter, I've got you covered. Go to
https://thesoulofyourbusinessbook.com