

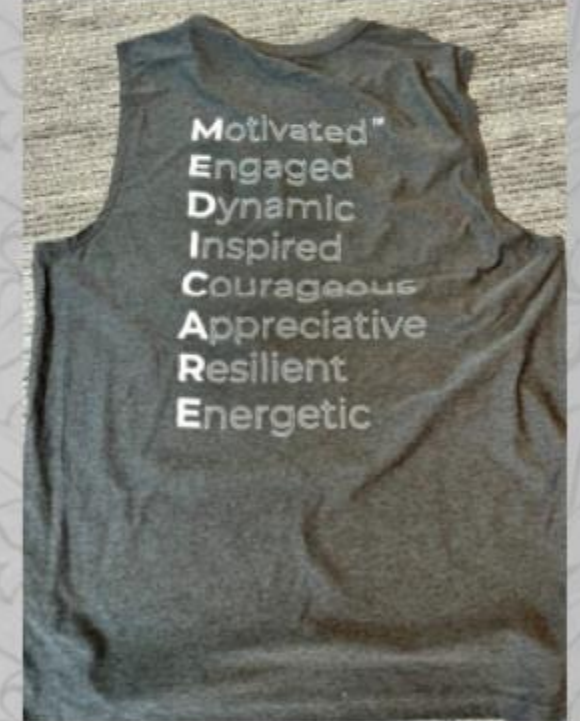
A man in a dark suit and a woman in a dark, sequined dress are smiling and looking at each other. The woman is holding a glass. The background is dark with bokeh light effects. The word "JUBILEE" is written in large, bold, gold, glittery letters across the center of the image.

# JUBILEE

A CELEBRATION OF A SPECIAL ANNIVERSARY

# 65 Years

Vince is Medicare Eligible!





# 20 Years



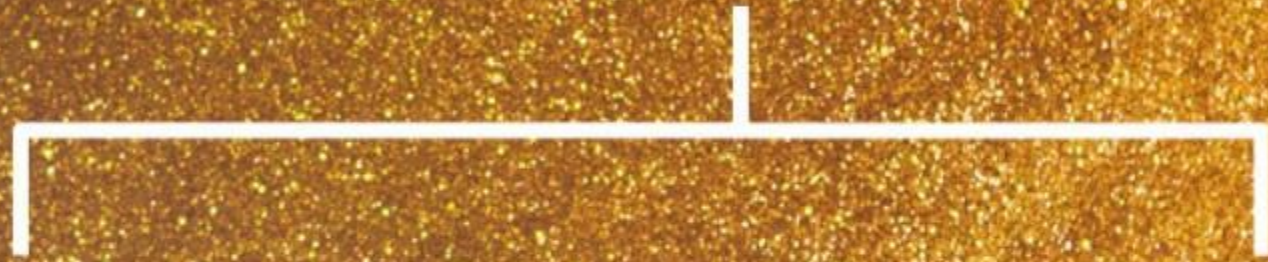
“Founded by Advisors for Advisors”

# Success Attributes

- Lessons learned
- Pitfalls to avoid
- Building a monumentally successful business (or life)



# ATTRIBUTES OF SUCCESS



Operational Human Interaction

Business



Personal





# JOHN WOODEN

Success is...

Peace of mind...

Knowing you have  
done your best

An aerial photograph of a coastal town at sunset. The ocean is on the left, with waves breaking onto a sandy beach. A pier extends into the water. A road runs parallel to the beach, lined with palm trees. Buildings are visible on a hillside in the background, with some lights on. The sky is a mix of orange, yellow, and blue.

**#1**

**Think BIG, then  
think BIGGER!**



# **1 Think BIG, then think BIGGER!**

**“When you want to be more successful more than you want to breathe, you WILL BE SUCCESSFUL.”**

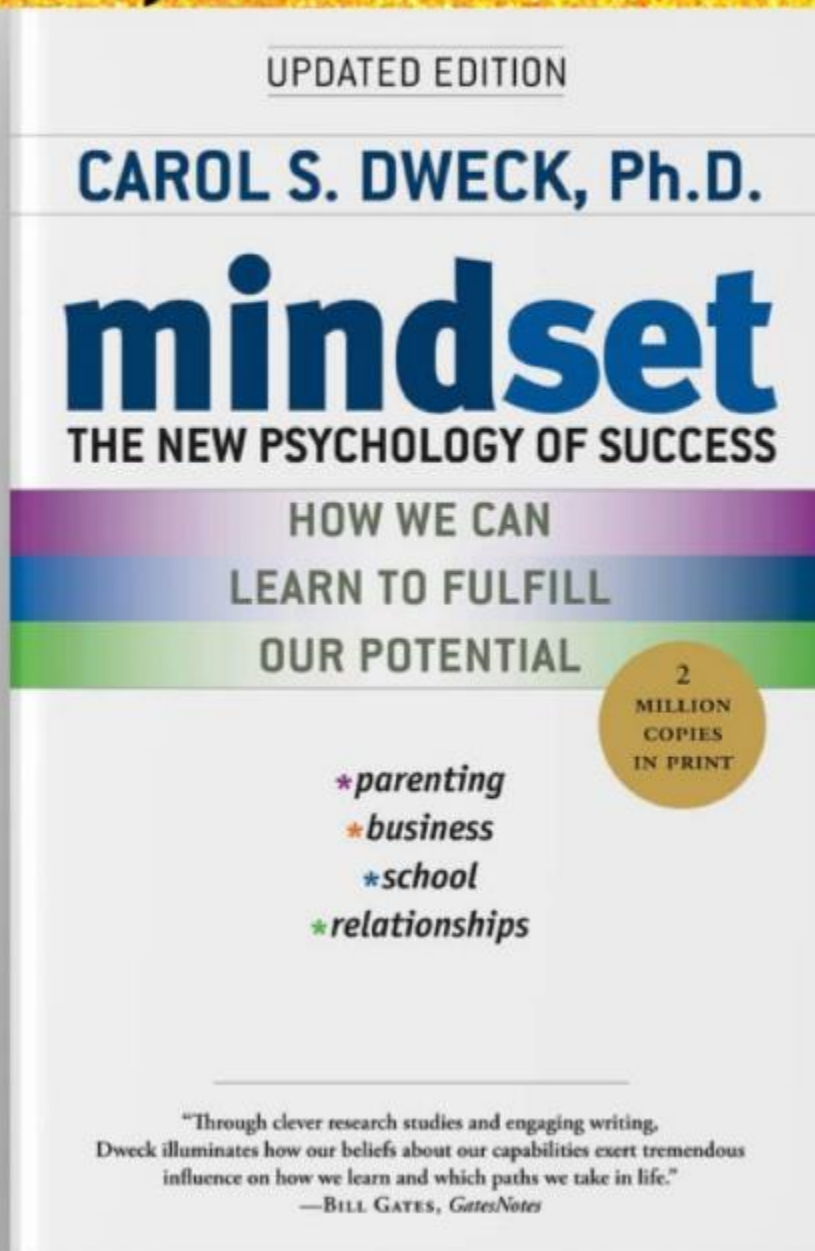
*- Michael Jordan*





# 1 Think BIG, then think BIGGER!

## Growth vs. Fixed Mindset



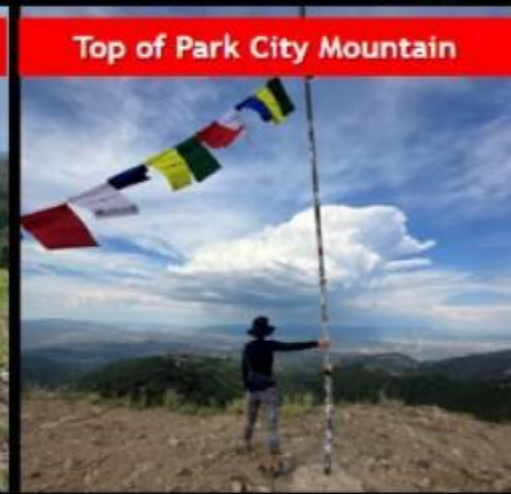
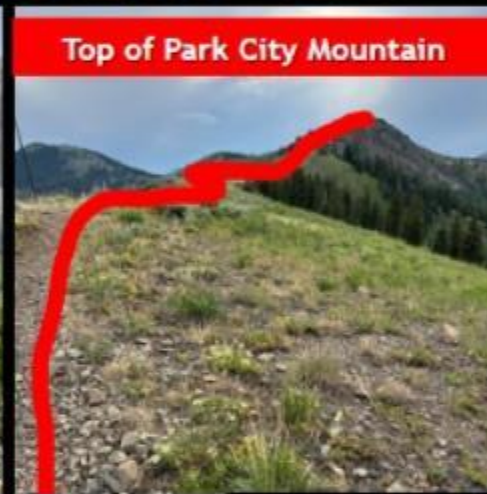
Dr. Carol Dweck





# 1 Think BIG, then think BIGGER!

## Think Big Examples Day-to-day





# 1 Think BIG, then think BIGGER!

## Think Big Examples

Life or Death



Captain Sully





A person stands on a large rock in the foreground, looking out over a vast ocean at sunset. The sun is low on the horizon, creating a golden glow across the sky and water. The sky is filled with soft, wispy clouds. The overall mood is contemplative and inspiring.

**#2**

**Start with Why?**

**What inspires you?**

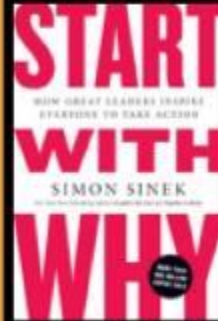


# 2 Start with Why? What inspires you?

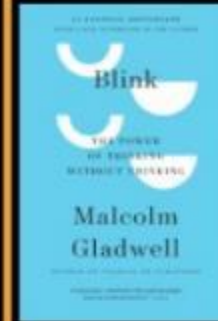
What?

How?

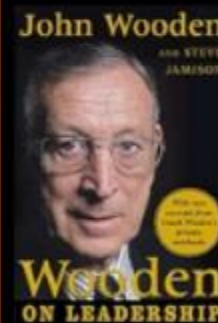
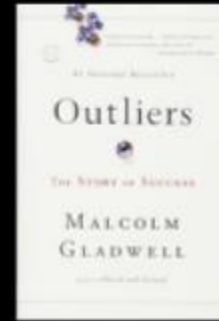
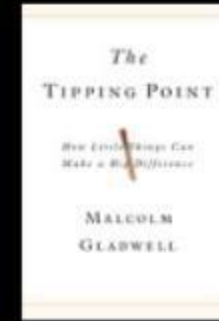
Why?



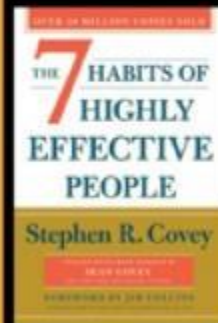
Simon Sinek



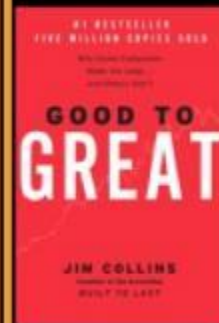
Malcom Gladwell



John Wooden



Stephen Covey



Jim Collins





# **2 Start with Why? What inspires you?**

## **Sample Advisory Firm**

### **Why?**

**“We are inspired to protect plan sponsors and create successful retirement outcomes.”**



# **2 Start with Why? What inspires you?**

## **Sample Advisory Firm**

### **How?**

“By leveraging technology, and software that enhances outcomes, providing hands on superior, and responsive guidance, and advice.”



# **2 Start with Why? What inspires you?**

## **Sample Advisory Firm**

### **What?**

**“We will work with plan fiduciaries and participants to accomplish these objectives.”**





# #3

**“The reward is  
the work itself.”**

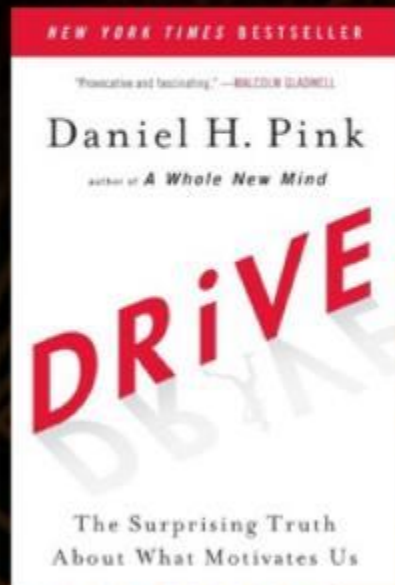
Deep enjoyment/fulfillment for what  
you do (usually follows #2)



# 3 “The reward is the work itself.”

## Motivation 3.0

Daniel Pink “Drive”



Reward  
Punishment

Survival

3.0

2.0

1.0

In the zone.  
Connected.  
Mastery.  
Purpose.



**3 “The reward is the work itself.”**

A group of five Navy SEALs in full combat gear, including helmets, vests, and rifles, are running along a sandy beach. They are splashing through shallow water, and the ocean waves are visible in the background. The scene is captured in a cinematic style with a slightly desaturated color palette.

**NAVY SEALS**



A blurred office scene with several people working at desks with computers. The image has a warm, yellowish tint.

# #4

# Resilience & Grit

“Perseverance during times of extreme stress, adversity, obstacles, or distractions.”



# 4 Resilience & Grit

We all will face **EXTREME**  
adversity in our lives.





# 4 Resilience & Grit

## “Competitive Greatness”

John Wooden

*The Pyramid of Success*

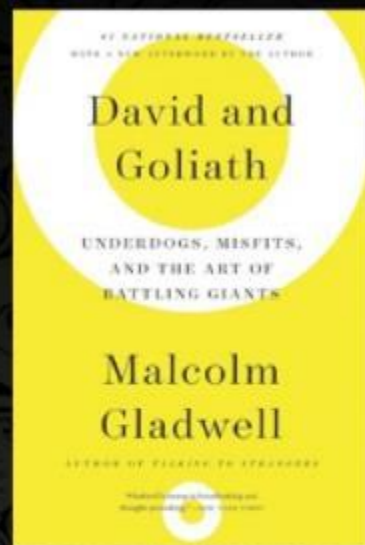




# 4 Resilience & Grit



Malcolm Gladwell



Facing Adversity

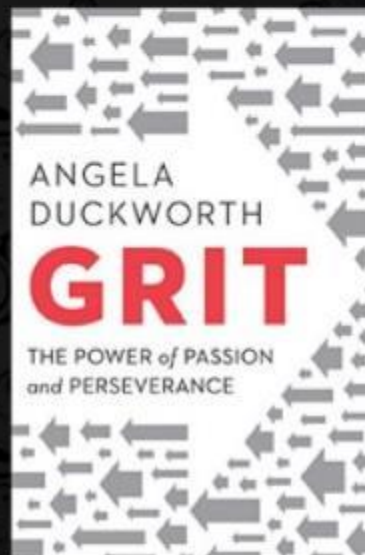


Give up

Dig in



Angela Lee Duckworth



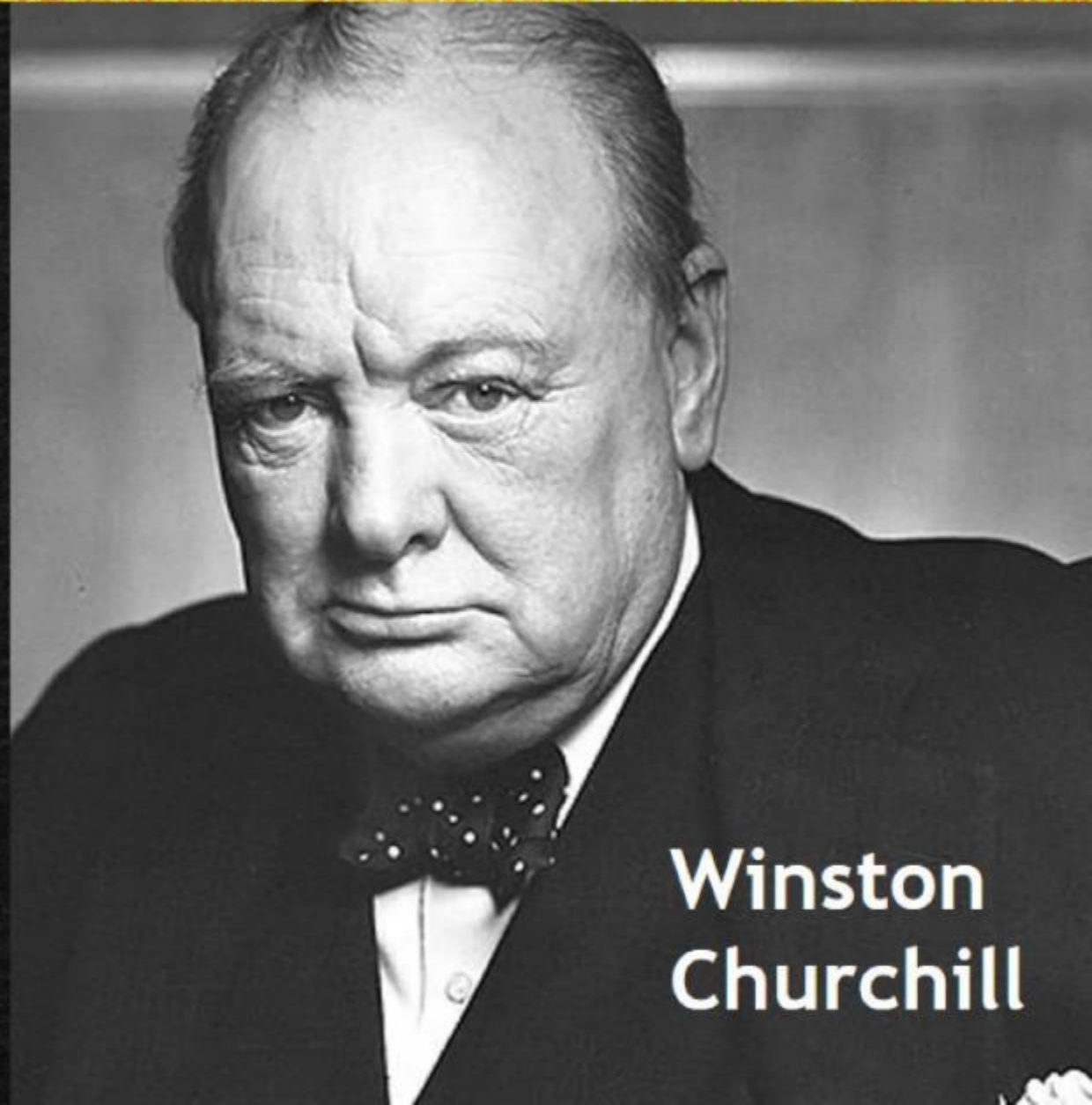


# 4 Resilience & Grit

**Success...  
never final.**

**Failure isn't fatal.**

**“It’s the courage to  
continue that counts.”**



**Winston  
Churchill**





**#5**

**Practice Gratitude**

(Every single day)



# 5 Practice Gratitude



HUMILITY



VULNERABILITY

# GRATITUDE



APPRECIATION



AUTHENTICITY



# **5 Practice Gratitude**

**SAY IT NOW**

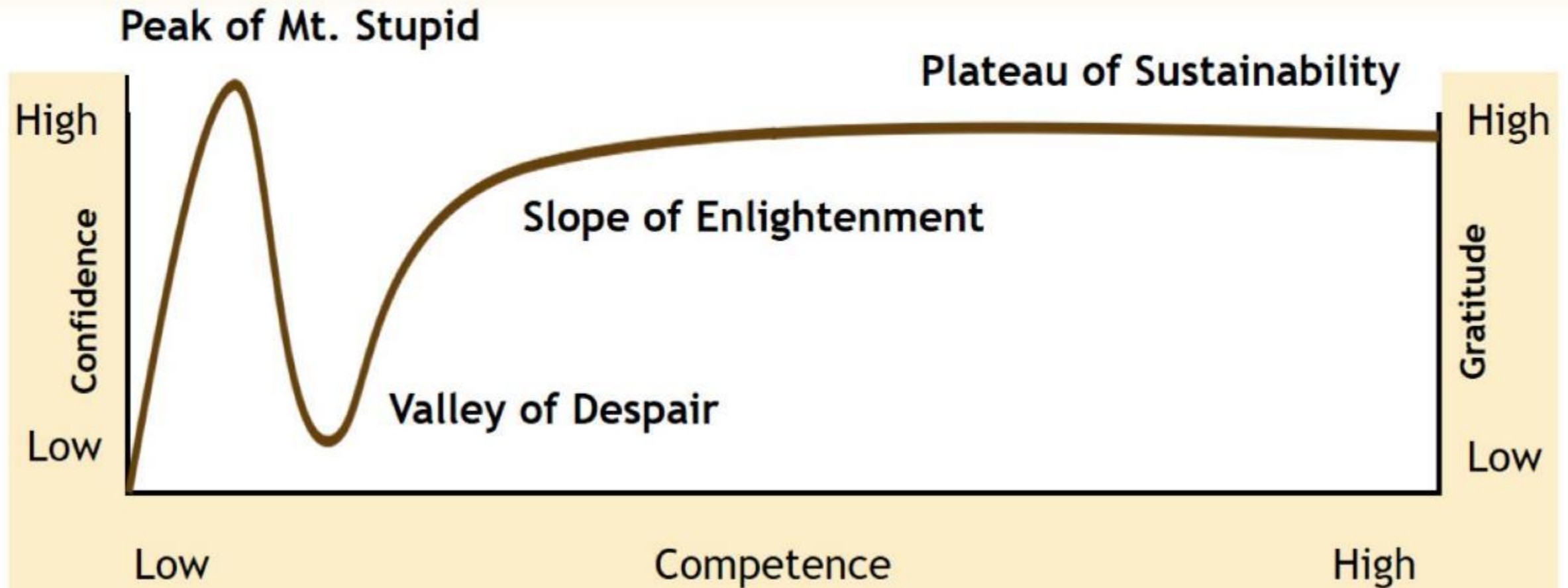
**“Express gratitude by paying  
tribute to the people in our lives  
that make a difference.”**

**- Walter Green**



# 5 Practice Gratitude

## Dunning-Kruger Effect





# #6

# “Radical Truth and Transparency”





# **6 Radical Truth & Transparency**

RAY DALIO

Bridgewater Associates

**“There is an obligation to share critical feedback, ideas, and thoughts...”**



# **6 Radical Truth & Transparency**

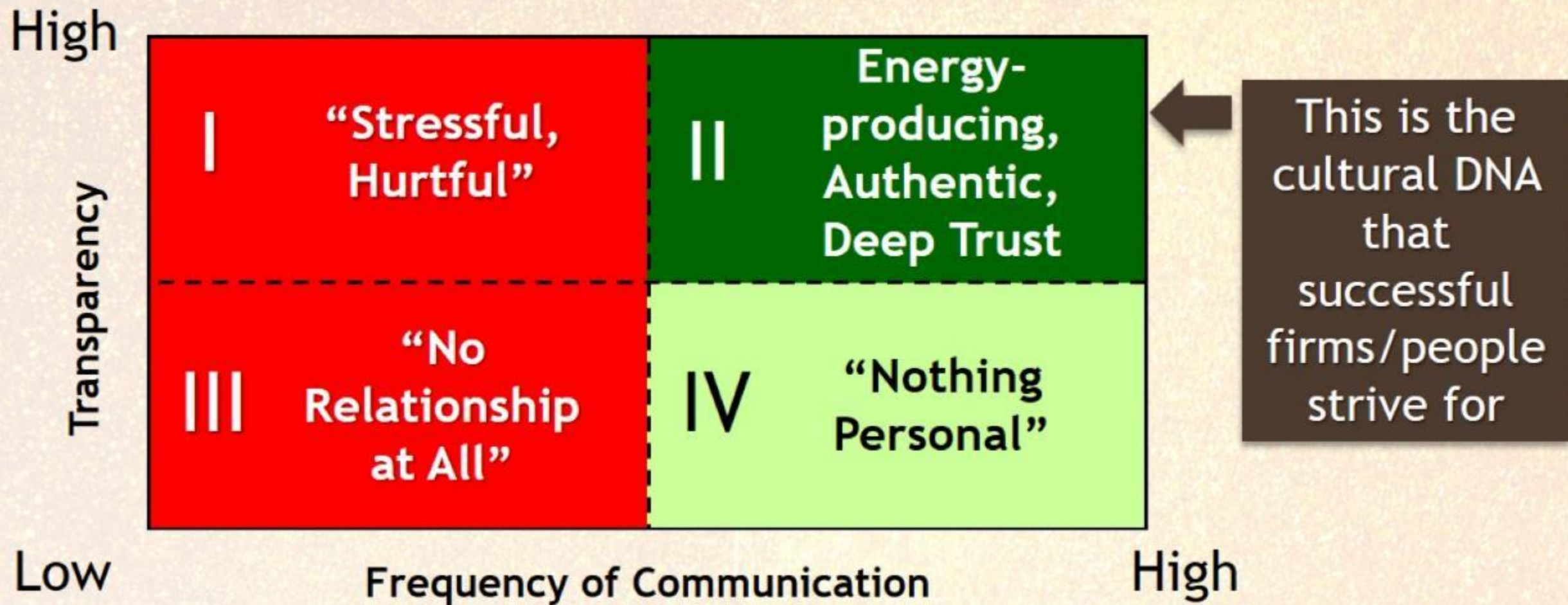
**RAY DALIO**

Bridgewater Associates

**“...that have the potential to create or enhance customer outcomes and/or relationships...”**



# 6 Radical Truth & Transparency





**Closing thoughts...**





# Attributes of Highly Successful Businesses / Individuals

**1**

**Think BIG, then  
think BIGGER!**

**2**

**Start with Why?  
What inspires you?**

**3**

**“The reward is  
the work itself.”**

**4**

**Resilience  
& Grit**

**5**

**Practice  
Gratitude**

**6**

**Radical Truth &  
Transparency**



# RPAG Member Attributes

**1**

**Think BIG, then  
think BIGGER!**

**2**

**Start with Why?  
What inspires you?**

**3**

**“The reward is  
the work itself.”**

**4**

**Resilience  
& Grit**

**5**

**Practice  
Gratitude**

**6**

**Radical Truth &  
Transparency**



# Say It Now

**NICK**



**JAMI**



**VERONICA**



**JEFF**



**JESSE**



**JOEL**



**DELLA VEDOVA**

**CHAPMAN**

**LEE**

**ELVANDER**

**TAYLOR**

**SHAPIRO**



# BALANCED LIFESTYLE





The background features a dark blue gradient with golden light rays emanating from the top center. Scattered throughout are numerous out-of-focus golden bokeh lights of varying sizes, creating a warm and celebratory atmosphere.

**THANK YOU!**







R P  
A G

JUBILEE

CELEBRATING 20 YEARS