



THE CORE CONDITIONING PROGRAM™

The Starter Session

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*“Most people would like to be in better shape,
both personally and financially”.*

That’s why we created
The Core Conditioning Program™.

The program helps you get into top
financial and personal **condition** by getting
to the **core** of what you really want in life.

It helps you cure
The Weak Core Syndrome.



As a Certified Financial Planner, my focus is to help successful professionals & business owners who have a passion for a fit and active lifestyle to make sound decisions with their money.

However, I believe that the purpose of a trusted financial advisor goes well beyond just selecting the right investment solutions for your financial needs...

“If you were to ask most people, they would tell you unequivocally that they would like to be in better shape, both personally & financially”.

That’s why we created **The Core Conditioning Program™**.

The Core Conditioning Program™ is a total financial life planning program designed for successful professionals & business owners who have a passion for a fit & active lifestyle and are serious about maximizing their long-term financial as well as personal & professional performance.

The program helps you get into top financial and personal condition by getting to the core of what you really want in life. It also helps you cure **The Weak Core Syndrome™**.

We understand the challenges that you face in building a successful business, or professional practice and are uniquely qualified to help you seize the opportunities that are available to you to maximize your financial & personal well-being.

We understand what is important to you & we provide strategies & solutions to help you to maximize your financial & personal core conditioning.

We offer our clients two choices: **basic** and **advanced**. For the basic service, we can provide you with financial planning services and products. Of course, you can get the basic from many other advisors. However, the advanced program we created—**The Core Conditioning Program™**—takes everything to a much higher level and is only available from me, and our team. It is important to point out that you don't need to give up any existing advisors to participate in this advanced program.



We realize that the advanced program is not for everyone. It is for successful business owners & (incorporated) professionals who are generosity-minded, family-oriented, and down to earth. They are coachable, open to new ideas, and willing to take the time to plan. They are also serious about working on their financial fitness.

If this description “fits”, you might be a good candidate for this program.

We created **The Core Conditioning Program** based on our experience working with hundreds of clients. We have learned that many people don't get the most out of their money or their life because they haven't gotten to the core of what they really want. They may have set some goals and created a plan, but they don't stick to the plan because it isn't designed to achieve what they really want.

As a result, they often don't get the most out of their money or their life, they feel frustrated and disappointed, and ultimately, they don't achieve what they really want in life.

However, when you get to the core of what you really want, have the commitment & accountability to overcome any obstacles that stand in your way, you will be more likely to stick to your plan.

As result, you will be in a better position to have enough money. You will feel more excited and fulfilled, and you will more likely achieve what you really want in life.

The Core Conditioning Program™ is designed to help you to get into top financial and personal condition by focusing on three things:

- 1. Get to the CORE of what you really want; financially and personally.**
- 2. Create a three-part plan (personal, professional, and financial).**
- 3. Stick to the plan & overcome obstacles that stand in your way.**

If you want to work on these steps with us, we offer a free 90-minute starter session. During this session, we will help you assess your current situation and get to the core of what you really want. We will then decide together if you should join the advanced program to create and implement your *Core Conditioning Plan*.

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The Weak Core Syndrome





The Core Conditioning Program™





The Core Conditioning Scorecard™

To help you clearly understand your current level of conditioning (**personal**, **financial** and **professional**), complete **The Core Conditioning Scorecard™**. Rate your reactions to each pair of phrases. Decide where you fit on the scale from 1 to 10. Add up your total from each column.

I don't have a clear vision for I want in my life nor a plan to get there.	1	2	3	4	5	6	7	8	9	10	I have a clear vision for what I want in my life & a plan to get there.
I am not happy with the progress I am making towards achieving what I want in my life .	1	2	3	4	5	6	7	8	9	10	I am happy with the progress that I am making towards achieving what I want in my life.
I am not on track to enjoy a comfortable retirement & to stay comfortably retired.	1	2	3	4	5	6	7	8	9	10	I am on track to enjoy a comfortable retirement & to stay comfortably retired.
My financial plan is disorganized, fragmented and out of date.	1	2	3	4	5	6	7	8	9	10	My financial plan is organized, integrated & current.
I am not getting the most out of what I am doing with my money.	1	2	3	4	5	6	7	8	9	10	I am maximizing what I am doing with my money and minimizing my mistakes .
I am worried and concerned about my future.	1	2	3	4	5	6	7	8	9	10	I feel excited and energized about my future.
My health & fitness & well-being is poor.	1	2	3	4	5	6	7	8	9	10	My health & fitness & well-being is excellent.
I am not happy with the current state and direction of my career (<i>or personal life if retired</i>).	1	2	3	4	5	6	7	8	9	10	I am happy with the current state and direction of my career (<i>or personal life if retired</i>).
I am dissatisfied with the financial advice/guidance I am currently receiving.	1	2	3	4	5	6	7	8	9	10	I am completely satisfied with the financial advice/guidance I am currently receiving.
I don't feel that I am living my life with passion & purpose	1	2	3	4	5	6	7	8	9	10	I feel I am living my life with passion & purpose.

Your Scorecard Total: _____



Your CORE Vision

1. Imagine your life from today going forward as an exciting adventure, with no limitations. Describe the CORE vision of what you want your life to look like. **(Include aspects of your personal, financial & professional life)**

Write out your answer in as much detail as possible.. Feel free to write down your deepest desires.



Living Your CORE Vision

2. Fast forward three years from today, and you were looking back over those three years, what has to have happened in your life, personally, financially & professionally, for you to feel happy with your Progress?"

Your Road Blocks

3. List any possible Road Blocks that could get in the way of completing your Vision:



-
-
-
-
-



Your Commitment to Completion:

4. WHY is completing your CORE VISION important to you? Describe as many reasons as you can WHY you are 100% committed to your CORE VISION?



My Personal Core Vision: _____

The Three Projects

To achieve My Personal Core Vision, I need to work on these three projects:

- 1.
- 2.
- 3.

My Three Actions

To get started, I must immediately take these three actions:

- 1.
- 2.
- 3.



My Financial Core Vision: _____

The Three Projects

To achieve My Financial Core Vision, I need to work on these three projects:

- 1.
- 2.
- 3.

My Three Actions

To get started, I must immediately take these three actions:

- 1.
- 2.
- 3.



My Professional Core Vision: _____

The Three Projects

To achieve My Professional Core Vision, I need to work on these three commitments.

- 1.
- 2.
- 3.

My Three Actions

To get started, I must immediately take these three actions:

- 1.
- 2.
- 3.



The Core Conditioning Program™





The Core Conditioning Principles™

- **Get to the CORE of what you really *want* in life: Clarify your Core Vision.**
- **Clarify your current Core Condition-financial, professional, personal.**
- **Have a CORE philosophy for SUCCESS based on what is humanly possible.**
- **Create a 3 Part Plan to get what you want: Personal, Financial & Professional.**
- **Do the work (*that your goals are asking you to do to achieve them*).**
- **Work hard but play harder. (*Life is supposed to be FUN*).**
- **Overcome any Road Blocks/Obstacles that could hold you back.**
- **Get Excited & Energized: Develop Unstoppable Belief in yourself.**
- **Stick to your Plan: Commitment to Completion.**
- **Align yourself with trusted professionals who will hold you Accountable.**

**This Program is not for everyone.
Our Ideal Members are...**

Generosity Minded People

- Family oriented
- Successful
- Down to earth
- Want to give back to their community
- Coachable: Open to new ideas
- Fun to be around
- Willing to take the time to plan for the future
- Serious about working on their financial & personal fitness



Three Benefits

Get to the core of what you want .

1. Have enough Money.

2. Feel excited and Fulfilled.

3. Achieve your life goals.

1. Get the core of what you really want, personally and financially.

2. Create a plan to achieve what you really want.

3. Stick to the plan



- **The Core Conditioning Program™ Starter Session.**
- **Core Conditioning Program 3 Part Implementation Plan.**
- **Core Conditioning Advanced Lifestyle Plan.**
- **Access to High Net Worth Investment Solutions.**
- **Financially Fit For Life Wealth Accumulation Plan.**
- **Financially Fit For Life Lifetime Income Plan.**
- **Tax Leak Strategy.**
- **Insurance & Estate Maximization Plan.**
- **Investment & Insurance Products & Services.**
- **Progress Review & Accountability Plan.**