



MARK WILLIS
LEADERSHIP

CIRCLE OF 5

FINANCIAL

DATE

Instructions: List out your Financial 5 below. After you have listed your 5, use the spaces provided to write-out why. Next, estimate the annual revenue for each and total that number. Once totaled, divide by 5. How close is that average to your annual income? Chances are it's pretty close.*

**Hint: People don't make as much as you think they do.*



1	2	3	4	5
WHO	WHO	WHO	WHO	WHO
ESTIMATED ANNUAL INCOME \$	ESTIMATED ANNUAL INCOME \$	ESTIMATED ANNUAL INCOME \$	ESTIMATED ANNUAL INCOME \$	ESTIMATED ANNUAL INCOME \$
WHY	WHY	WHY	WHY	WHY
RATING	RATING	RATING	RATING	RATING
1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10

**On a scale of 1-10, circle the number that you feel best represents the closeness in your relationship. Any relationship with a member of your 5 that is lower than a "6" on your scale of 1-10 is a relationship that needs nurturing.*

CIRCLE OF 5

WEALTH DETERMINERS (WD'S)

DATE

Instructions: In the empty circles provided below, list out your WD's. After you have listed your WD's, use the space provided to write-out why each of these individuals are your WD's.



1	2	3	4	5
WHO	WHO	WHO	WHO	WHO
ESTIMATED ANNUAL INCOME \$	ESTIMATED ANNUAL INCOME \$	ESTIMATED ANNUAL INCOME \$	ESTIMATED ANNUAL INCOME \$	ESTIMATED ANNUAL INCOME \$
WHY	WHY	WHY	WHY	WHY
RATING	RATING	RATING	RATING	RATING
1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10

**On a scale of 1-10, circle the number that you feel best represents the closeness in your relationship. Any relationship with a member of your 5 that is lower than a "6" on your scale of 1-10 is a relationship that needs nurturing.*

TARGET PLANNING

DATE

SOMEDAY	BUSINESS	PERSONAL
5 YEAR	BUSINESS	PERSONAL
3 YEAR	BUSINESS	PERSONAL
1 YEAR	BUSINESS	PERSONAL
THIS MONTH	BUSINESS	PERSONAL
THIS WEEK	BUSINESS	PERSONAL
TODAY	BUSINESS	PERSONAL

WHO AM I?

(Hint: It is said that the most important question you can ask yourself is Who am I?)

WHAT AM I DOING?

(Hint: Honesty will set you free.)

WHAT WILL I HAVE?

AMWD

DATE

ANNUAL	BUSINESS		PERSONAL		
MONTHLY	BUSINESS		PERSONAL		
WEEKLY	WEEK 1	WEEK 2	WEEK 3	WEEK 4	
	BUSINESS	BUSINESS	BUSINESS	BUSINESS	
	PERSONAL	PERSONAL	PERSONAL	PERSONAL	
DAILY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
	BUSINESS	BUSINESS	BUSINESS	BUSINESS	BUSINESS
	PERSONAL	PERSONAL	PERSONAL	PERSONAL	PERSONAL

ANNUAL

BUSINESS

PERSONAL

MONTHLY

BUSINESS

PERSONAL

WEEK 1	BUSINESS	PERSONAL
MONDAY	BUSINESS	PERSONAL
TUESDAY	BUSINESS	PERSONAL
WEDNESDAY	BUSINESS	PERSONAL
THURSDAY	BUSINESS	PERSONAL
FRIDAY	BUSINESS	PERSONAL

THE 1 MAIN BUSINESS OBJECTIVE

Write out your one main business objective for the year. This could be a number or this could be an accomplishment. Your business objective must be something measurable and achievable.

OBJECTIVE

3 GOALS TO ACHIEVE THE OBJECTIVE

GOAL 1	GOAL 2	GOAL 3
GOAL:	GOAL:	GOAL:
GOAL DETAILS:	GOAL DETAILS:	GOAL DETAILS:
5 STRATEGIES	5 STRATEGIES	5 STRATEGIES
STRATEGY 1	STRATEGY 1	STRATEGY 1
STRATEGY 2	STRATEGY 2	STRATEGY 2
STRATEGY 3	STRATEGY 3	STRATEGY 3
STRATEGY 4	STRATEGY 4	STRATEGY 4
STRATEGY 5	STRATEGY 5	STRATEGY 5

5-5-5-1-1-100

DATE

5 TO CALL	5 TO WRITE	5 TO SEE
1	1	1
2	2	2
3	3	3
4	4	4
5	5	5

THIS WEEKS OPEN HOUSE	THIS WEEKENDS OPEN HOUSE
1	2

PLAN YOUR 100

How do you plan on building your database to 100? If your database is at 100 (or more), write out your strategy for a bulk contact to 100 of those people.

Email Text Social

DOLLAR PRODUCTIVE ACTIVITIES

DATE

MOST

LEAST

50 THINGS YOU WANT IN LIFE

DATE

MATERIAL	1.		10.	
	2.		11.	
	3.		12.	
	4.		13.	
	5.		14.	
	6.		15.	
	7.		16.	
	8.		17.	
	9.		18.	
PURPOSE	19.			
	20.			
	21.			
	22.			
	23.			
	24.			
LEGACY	25.		38.	
	26.		39.	
	27.		40.	
	28.		41.	
	29.		42.	
	30.		43.	
	31.		44.	
	32.		45.	
	33.		46.	
	34.		47.	
	35.		48.	
	36.		49.	
	37.		50.	

START WITH THE PEOPLE CLOSEST TO YOU AND WORK YOUR WAY OUT

1. Who are the members of your family?
 - a) Who are the members of your spouse's family?
 - b) Who is your current best friend?
 - c) Who is the spouse of your best friend?
 - d) Who is your spouse's best friend?
 - e) Who are your top 10 friends?
 - f) What are the names of your spouse's top ten friends?
 - g) What are the names of your children's friend's parents?
2. What are your children's teacher's names?
 - a) Do you volunteer at school? If so what are the other parent's names?
3. What are your children's coaches names?
 - a) Do you know the parents on the sports teams?
 - b) Have you hosted a get together or pizza party for the team?
4. Who is your children's Sunday School teacher?
5. Other parents at church?
6. Who is your child's hairstylist?
7. What is your child's dentist's name?
8. Your dentist's name?
9. Your child's doctor's name?
10. Your doctor's name?
11. Your optometrist's name?
12. Your hair stylist's name?
13. Who do you know at church?
14. Who is your mailman?
15. What checkers do you know at the grocery store?
16. Who is your pharmacist?
17. Who does your pedicures and manicures, etc.?
18. What car salespeople have helped you?
 - a) Who services your car?
 - b) Who cleans your car?
19. Who is your spouses doctor?
20. Who is your pastor, rabbi, etc?
21. What is the name of your bank teller?
22. Who do you borrow money from at the bank?
23. Who prepares your taxes?
24. Who is your chiropractor?
25. Who is your financial planner?
26. Who does your book keeping?
27. Who owes you money?
28. Where do you put your pets when you're out of town? A pet hotel? What are their names?
29. How many restaurants do you regularly go to? What are the names of the owners/managers?
30. What bartenders do you know?
31. What sushi chef do you know?
32. What are the names of the other regulars at your restaurants?
33. Who do you play golf with?
34. Who do you mountain bike/road bike with?
35. Who do you ski with, camp with, off road with, play tennis with?
36. Do you know the names of the members of your country club?
37. Who is part of your FB groups listed in activities you are interested in?
38. Who do you go to concerts with?
39. Who are you children's music teachers?
40. Who do you go to the movies with?
41. What attorneys do you know?
42. Who is your pest control person?
43. What are the names of 5 lenders you would use?
44. Who would you call if you had an electrical problem?
45. Who picks up your trash?
46. Who does any handyman work around your house?
47. Who can fix your roof?
48. Who services your AC?
49. Who do you go to plays or the theater with?
50. Who does your landscaping?
51. Who were your last 3 landlords?
52. Who built your house?
53. Who fixes your computer?
54. Who did you buy your computer from?
55. Who do you buy your makeup and accessories from?
56. Who do you buy clothes from? Are there boutiques in your city?
57. What is the name of your insurance agent? Car, home, etc.?
58. Who is your travel agent?
59. Who did you receive cards from this year? Christmas, thank you's, etc.?
60. Who did you send cards to?
61. Who sold you your furniture?
62. Who works at your local coffee shop?
63. Who works in your office building?
64. Who works at your front desk?
65. Who works on your car?
66. Who have you done business with in the past?
67. Who do you buy produce from?
68. Who do you know at your local stores? Hardware, clothes, repair, beauty, etc.?
69. Who do you know in local politics?
70. Who do you know that leads adult classes or activities?
71. Who do you know from social organizations, trade industry, etc.?
72. Who do you buy carpets, rugs, drapes, and appliances from?
73. Who do you know in law enforcement?
74. Who do you know in fire fighting?
75. Who do you know that is a private investigator?
76. What chiropractors do you know?
77. Who are you old high school classmates? Who are local?
 - a) Who are your old teachers, coaches, principles, old college buddies, etc.?
78. Who is your florist?
79. Who are your old military buddies?
 - a) Who are their spouses and how can you help their businesses?
80. Who did you invite to your wedding?
81. Who are your 100 closest neighbors?
82. Who is your jeweler?
83. Who is your photographer?
84. Who do you know in your homeowner's association?
85. Who have you referred someone to?
86. Who are your past neighbors?
87. Who are your spouse's past neighbors?
88. What are the names of your spouse's co-workers?
89. Who do you buy advertising from?
90. Who does your home security system?
91. Who has helped you organize a charity event?
92. Who would you call if you're in trouble?
93. Who do you know from the gym?
94. Who owns the top independent companies in your town or area?
95. Who do your parents or family members do business with?
96. Who does your family know that should know you?
97. Who are your parent's neighbors?
98. Who are your sibling's neighbors?
99. Who is your parent's doctor or doctor's?
100. Who is the mover you would recommend, tile guy, kitchen guy, interior designer?