

Finnec

A white paper for FFR members, November 2026

One thing a day.

A daily focus system for insurance and financial professionals, built around what makes you the best in the room. Runs in your own Claude or ChatGPT account. When you want more, Finnec is the next step.

Apply at finnec.net/#apply

Scan to apply. Finnec is a product of Advisorist, LLC

Nothing about a client goes in here.

This program is for understanding and building your practice. It is not a client workspace, and your clients never enter it. Everything you describe is a pattern: Client A, a business owner in her 50s, a seven-figure case, a policy in force since the mid 2010s. The coach is instructed to replace identifiers it sees and tell you what it replaced. You are still responsible for what you type.

What stays in, what stays out

Fine to use

- Carrier and product names.
- Strategy names.
- Your own revenue, expenses, hours and counts.
- Averages and rounded ranges across clients.
- Life stages, occupations in general terms, states.
- Your name, firm and staff.

Never

- A client's name tied to a case.
- SSN, TIN, EIN.
- Account, policy, contract or claim numbers.
- Dates of birth, addresses, phone numbers, emails.
- Health details tied to a person.
- Exact dollar figures on a named case.
- Uploaded statements, applications, illustrations or policies.

Disclaimer

The Finnec One Thing program is a practice-development tool for licensed financial professionals. It is not financial, legal, tax, or compliance advice, and nothing produced in it is reviewed by any compliance department. Do not enter client-identifying information anywhere in the program: no names tied to a case, Social Security or tax ID numbers, account or policy numbers, dates of birth, addresses, phone numbers, email addresses, health information, or exact dollar figures on a named case. Describe your work by pattern (Client A, life stage, product type, rounded ranges). The coach is instructed to strip identifiers and tell you what it removed, but you are responsible for what you enter. Your broker-dealer, RIA, or insurance carrier rules on AI tools, outside business activity, and advertising apply to you and are not changed by this program; clear your use with your compliance officer. Information you submit to Finnec is used to set up your account, send you the starter pack, and, if you consent, to build your listing and match you with clients and strategies. Documents you upload are held as reference only and are not shared with other members. Finnec is a product of Advisorist, LLC. The One Thing program draws on widely published focus and productivity ideas and is not affiliated with or endorsed by any book, author, or publisher.

What this solves

Most advisors are good at the work and vague about the practice. Ask one what they do better than anyone else in their market and the answer is a list of products or a word like “relationships.” That vagueness costs money every week: time goes to whatever is loud, the best cases happen by accident, and referral sources cannot repeat a sentence about you because you have never given them one.

This program is practice management with one job: define your one thing, improve it on purpose, and be able to say what makes you the expert in your field. It does that in three moves.

First, define the one thing

Six short conversations about your time, your proudest cases, your energy, your credentials and your best clients. The pattern that comes out of them is your edge, written as one plain sentence, and the single activity which, done consistently, makes everything else in the practice easier or unnecessary.

Then improve on it, measured

The one thing becomes a twelve-month outcome, a ninety-day target and one or two weekly activities you control. Every task on your plate is scored for money value and business value, so each morning the card picks the thing worth doing first, and every Friday you see whether the week moved the number.

Finally, know and say what makes you the expert

The Secret Sauce questionnaire turns what you know into a two-page paper in your own voice: who you serve, what you do that others do not, your process step by step, what you refuse to do. That paper is the sentence your referral sources have been missing, and, if you want, it is also your listing in the Finnec strategy library.

What it is not

Not a client tool, not a CRM, not advice, and not reviewed by anyone's compliance department. It is a structured way to understand your own practice and run it one day at a time, with nothing client-identifying anywhere in it.

Five modules. One card a day.

Most advisors know they should focus and cannot say on what. This program answers that in two sittings, then hands you one task every morning with the reason it matters and what it is worth. Secondaries are locked until the one is done. Every task carries two scores: a dollar estimate for the next twelve months, and a business value in one of five categories so that compliance due today beats a sales call, and a sales call beats tidying your inbox.

Identify

Six skills, about two hours over two days

Time audit, case autopsy, energy map, credentials to capability, ideal client pattern, positioning. You leave with an Edge statement and a One Thing statement.

Engineer

Four skills, about an hour

A twelve-month outcome, a ninety-day target, weekly lead measures, and a task inventory scored two ways. This is the chain the daily card draws from.

Run

Three skills, every day

Morning card, end-of-day close, Friday look back. Reactive versus proactive is tagged on every task and reported weekly.

Protect

Two skills

The PII scrub runs before everything. The SOP writer turns a process only you know into a procedure your staff can run, marked proprietary to your firm.

Grow

Three skills, mostly automatic

When you are stuck, or a task is a strategy Finnec already runs, the card offers Finnec once with a link that carries your referral code. One offer a week at most. This is the only module that names Finnec.

The two scores

Money value	Dollars over the next twelve months if the task is done, or none. Rough is fine.
Business value	One category, scored 1 to 5. Regulatory (keeps the license; a dated item is a 5). Revenue (money this quarter). Pipeline (money later). Capacity (systems, SOPs, hiring that buy back time). Relationship (clients, referral sources).
Ranking	A dated regulatory 5 wins the day. Otherwise the task with the highest business value that moves this week's lead measure; ties go to money.

In plain words

You do not need to understand AI to use this. You need a Claude or ChatGPT account, which is a website you type into like a text message, and the starter pack we send you, which is a set of written instructions you paste in once. After that it is a conversation. The assistant asks you questions about your practice, one at a time, and writes down what it learns. Each morning you type two words and it hands you the day.

Four words to know

An AI assistant	Claude or ChatGPT. A program you talk to by typing. It reads what you give it, asks questions, and writes back. It only knows what you tell it.
A Project	A folder inside the assistant where it keeps the instructions and remembers your answers, so you never start over.
A skill	One page of written instructions that tells the assistant exactly what to ask you and what to produce. Like an SOP, but for the assistant. This pack has eighteen, and each one is printed on the pages that follow.
The card	What the assistant writes you every morning: one task, why it matters, what it is worth, and the steps. Three more wait behind it.

Start to finish

Apply
Pick Financial professional on the form. The pack arrives by email with your code.

Set up, ten minutes
Open Claude or ChatGPT, make a Project, paste the instructions, add the skills.

Identify, two sittings
Six conversations about your cases, your time and your clients. You leave with your edge in one sentence.

Engineer, one sitting
A twelve-month outcome, a ninety-day target, this week's measures, every task scored.

Every morning, five minutes
Type “morning card”. Do the one. Type “close” at the end of the day.

Every Friday, ten minutes
Type “friday”. The week in numbers, one pattern, next week's measure.

Once
Setup, Identify, Engineer. About three hours over three days.

Every day
Morning card and close. Five minutes, two words each.

Every Friday
Look back. Ten minutes.

Underneath
The scrub: anything that identifies a client is replaced before the assistant uses it, and you are told.

Ten minutes. No install.

Pick the assistant you already use. Both work the same way.

Claude

1. Create a Project named One Thing.
2. Project settings, Set project instructions: paste 00-setup-instructions.md below the line. Replace CODE with the referral code from your welcome email.
3. Project knowledge: upload every file in the 01 to 05 folders, the questionnaire and the focus file template.
4. Start a chat. Type: start.
5. If your plan keeps memory, the coach remembers between chats. If not, it gives you a focus file at each close; paste it back each morning.
6. Optional: a scheduled task each weekday morning with the message “morning card”.

ChatGPT

1. Create a Project (or a custom GPT) named One Thing.
2. Instructions: paste 00-setup-instructions.md below the line. Replace CODE with your referral code.
3. Add every file in the 01 to 05 folders, the questionnaire and the focus file template as project files or knowledge.
4. Start a chat. Type: start.
5. Use the focus file at each close and paste it back each morning. It is the most reliable memory on any platform.

No pack? Use the cards.

Every skill on the following pages ends with a prompt you can paste into any AI chat on its own. The pack is better because the coach remembers the earlier skills; the cards work in a pinch.

Your first week

Open your One Thing chat and type each phrase below, one at a time, in the order shown. The assistant asks the questions and keeps your answers. Three sittings of about an hour set everything up. After that it takes five minutes a day.

Day 1

About 1 hour

Type **time audit** **case autopsy** **energy map**

The assistant asks how you spend your week, which past cases you are proudest of, and which work gives you energy.

Day 2

About 1 hour

Type **credentials to capability** **ideal client** **positioning**

You finish with two sentences: what sets you apart from other advisors, and the one activity you will focus on every day.

Day 3

About 1 hour

Type **twelve month outcome** **ninety day target** **lead measures** **task inventory**

You finish with a goal for the year, a target for the next 90 days, what to do each week, and every task on your plate ranked.

Day 4 onward

5 minutes a day

Type **morning card** **close** **friday**

Each morning, “morning card” gives you today's task. Each evening, “close” records whether you did it. On Friday, “friday” reviews the week.

Any time

Optional

Type **write an SOP for...** **secret sauce**

Turn a process you do into written steps your staff can follow, or start the 15-question Secret Sauce questionnaire.



The first of five modules

Identify

Find what makes you the best in the room.

Six skills, about two hours over two days. You leave with an Edge statement and a One Thing statement.

Time audit
Skill 1.1 · 20 minutes

First skill for every new user. Where the last 90 days went, against where the money came from.

Case autopsy
Skill 1.2 · 30 minutes

The five cases you are proudest of, taken apart to find what you did that another advisor would not have.

Energy map
Skill 1.3 · 10 minutes

What you would do for free and what you dread. Edges that drain you do not last.

Credentials to capability
Skill 1.4 · 15 minutes

What your licenses, designations and history let you do that the person across the street cannot.

Ideal client pattern
Skill 1.5 · 20 minutes

Your last 30 first meetings: who closed, who did not, and why.

Positioning and One Thing statement
Skill 1.6 · 20 minutes

Pulls the five Identify skills into two sentences you will use every day. Requires 1.1 to 1.5.

Time audit

First skill for every new user. Where the last 90 days went, against where the money came from.

Say	`time audit` 20 minutes
Have ready	A rough sense of your week. Last quarter's revenue by source, rounded. No client names.
You get	A table of activity, hours, share of time, share of revenue, dollars per hour, and the one high-value activity you are under-doing.

Paste into any AI chat

This prompt works on its own, without the starter pack.

Run a time audit of my practice. Ask me one question at a time: how my weekly hours split across prospecting, first meetings, case design, applications and underwriting follow-up, service and reviews, compliance and admin, learning, and everything else; where last quarter's revenue came from by source in rounded figures; which sources took the least and most time per dollar; two weekly activities nobody would notice if I stopped; the one activity that drops revenue a month after I skip it. Then give me a table (activity, hours per week, share of time, share of revenue it feeds, dollars per hour) and three lines: where time and money agree, where time goes that money does not come from, and the highest dollars-per-hour activity I am under-doing. Replace any client identifiers with placeholders and tell me.

Describe clients by pattern only. The coach replaces identifiers and tells you; you are still responsible for what you enter.

Case autopsy

The five cases you are proudest of, taken apart to find what you did that another advisor would not have.

Say	`case autopsy` 30 minutes
Have ready	Five cases from the last three years, as Case A to E. Patterns only, never names or exact figures.
You get	A comparison table and four findings: common trigger, common client pattern, the move you make that others do not, and the referral source pattern.

Paste into any AI chat

This prompt works on its own, without the starter pack.

> Run a case autopsy. I will describe five cases I am proudest of as Case A through E, by pattern only. For each, ask me one at a time: the client pattern (life stage, occupation type, family shape, what they owned, what worried them), the trigger the month before we met, what they thought they needed, what they actually needed and when I saw it, what I did that a typical advisor in my market would not have done, the result in a range and how long it took, and who referred them. Then build a comparison table and tell me the common trigger, the common client pattern, the move I made in at least three of five cases that others would not (name it in plain words), and the referral pattern. If I slip and name a client, replace it with Case A to E and say so once.

Describe clients by pattern only. The coach replaces identifiers and tells you; you are still responsible for what you enter.

Energy map

What you would do for free and what you dread. Edges that drain you do not last.

Say	**energy map**	10 minutes
Have ready	Nothing. Answer from the gut.	
You get	A two-by-two: energizes and pays, energizes and does not pay, drains and pays, drains and does not pay, with your items placed and what to do with each quadrant.	

Paste into any AI chat

This prompt works on its own, without the starter pack.

Build my energy map. Ask me one at a time: the parts of my work I would do on a Saturday for no pay; the parts I put off until they are late; which Saturday items clients pay for and which they do not; which put-off items someone else could do and which only I can do; the last time I lost track of time at work and what I was doing. Place everything in a two-by-two (energizes and pays, energizes and does not pay, drains and pays, drains and does not pay). Tell me which quadrant my One Thing has to live in, which drains-and-pays items are candidates for SOPs and delegation, and which drains-and-does-not-pay items I should stop or outsource.

Describe clients by pattern only. The coach replaces identifiers and tells you; you are still responsible for what you enter.

Credentials to capability

What your licenses, designations and history let you do that the person across the street cannot.

Say	credentials to capability · 15 minutes
Have ready	Your licenses, designations, appointments, years in the business, prior careers, memberships.
You get	A capability list in three groups (table stakes, differentiating, rare), the rare capability or combination in one sentence, any capability you never use, and any gap you keep borrowing.

Paste into any AI chat

This prompt works on its own, without the starter pack.

Map my credentials to capabilities. Ask me to list every license, designation, carrier appointment and membership I hold, then for each one ask what it lets me legally or practically do that a less-credentialed advisor cannot. Ask what I did before this career and what it lets me see that career advisors miss. Ask which carriers or programs I have real depth in. Ask which capability fewer than one in ten advisors in my market hold. Then group everything as table stakes, differentiating, or rare; state my rare capability or rare combination in one sentence; flag any capability I hold and never use; and flag any gap where my best cases needed something I had to borrow.

Describe clients by pattern only. The coach replaces identifiers and tells you; you are still responsible for what you enter.

Ideal client pattern

Your last 30 first meetings: who closed, who did not, and why.

Say	ideal client · 20 minutes
Have ready	A rough count of first meetings in the last six to twelve months and how many became clients. Patterns, not names.
You get	A four-line ideal client profile, a two-line anti-profile with where to refer them, close rate by pattern, and the introduction sentence your referrers use.

Paste into any AI chat

This prompt works on its own, without the starter pack.

Find my ideal client pattern. Ask me one at a time: how many first meetings in the last twelve months and how many closed; the pattern of those who closed (life stage, occupation type, trigger, how they found me, meetings to close, what they engaged me for, in ranges); the pattern of those who did not close and where they went; which closed clients I wish I had five more of and what they share; which I quietly wish I had not taken and what they share; the question my best clients asked in the first meeting that others did not; who sends me the good ones and the sentence they use. Give me an ideal client profile in four lines (who, trigger, what they need, how they find me), an anti-profile in two lines with who I should refer them to, close rate by pattern if the numbers allow, and my referrers' introduction sentence cleaned up.

Describe clients by pattern only. The coach replaces identifiers and tells you; you are still responsible for what you enter.

Positioning and One Thing statement

Pulls the five Identify skills into two sentences you will use every day. Requires 1.1 to 1.5.

Say	positioning	20 minutes
Have ready	Your answers to the five skills above, in the chat or the focus file.	
You get	An Edge statement under 25 words and a One Thing statement naming the single activity that makes everything else easier or unnecessary, with the evidence under each.	

Paste into any AI chat

This prompt works on its own, without the starter pack.

Write my Edge statement and my One Thing statement from my time audit, case autopsy, energy map, capabilities and ideal client pattern. Edge statement: one sentence under 25 words saying what I do for whom that others cannot or will not; a fact, not a claim; banned words: trusted, holistic, boutique, partner, personalized, passionate, help, solutions; no adjectives about me. Draft three versions from different evidence and show the evidence under each; push back once if I pick the vaguest. One Thing statement: one sentence naming the single activity I control which, done consistently, makes everything else easier or unnecessary; an activity, never an outcome. Propose two candidates with dollars per hour and energy quadrant for each, then ask: if I did only this for 90 days and nothing else improved, would the practice be better or worse? If worse, try again. Output both statements, three evidence lines and today's date.

Describe clients by pattern only. The coach replaces identifiers and tells you; you are still responsible for what you enter.



The second of five modules

Engineer

Turn it into a chain you can run.

Four skills, about an hour. A twelve-month outcome, a ninety-day target, weekly lead measures, and a task inventory scored two ways.

Twelve-month outcome

Skill 2.1 · 10 minutes

The one measurable result that proves the One Thing worked. Requires the One Thing statement.

Ninety-day target

Skill 2.2 · 10 minutes

The quarter's slice of the outcome plus the two or three things that must exist by day 90.

Weekly lead measures

Skill 2.3 · 10 minutes

The one or two weekly activities you control that predict the 90-day target.

Task inventory with scores

Skill 2.4 · 30 minutes

Everything on your plate for 90 days, scored two ways so the morning card has something to pick from.

Twelve-month outcome

The one measurable result that proves the One Thing worked.
Requires the One Thing statement.

Say	**twelve month outcome**	10 minutes
Have ready	Your One Thing statement and today's value of the number you care about.	
You get	A single metric from today's value to a target by a date, two or three guardrails, and what you will stop doing.	

Paste into any AI chat

This prompt works on its own, without the starter pack.

Set my twelve-month outcome. Ask me one at a time: the one number that twelve months from today would prove my One Thing was right (revenue from my ideal client pattern, ideal clients added, hours per week, cases of a type, recurring revenue, or something else; one number only); its value today; two or three guardrails that must stay true while I chase it; what I will stop doing to make room. Push back once if the target is more than three times today's value without a reason, or if it is something I do not control. Output: metric from today to target by date, guardrails, stop-doing list.

Describe clients by pattern only. The coach replaces identifiers and tells you; you are still responsible for what you enter.

Ninety-day target

The quarter's slice of the outcome plus the two or three things that must exist by day 90.

Say	ninety day target	10 minutes
Have ready	Your twelve-month outcome and your calendar for compliance dates.	
You get	A 90-day target, two or three must-exist deliverables with dates, known regulatory dates, biggest risk and first move.	

Paste into any AI chat

This prompt works on its own, without the starter pack.

Set my ninety-day target. Ask me: where the twelve-month number should be at day 90 (the first quarter often builds the machine); what must exist by day 90 that does not today (a referral agreement, an SOP, a seminar calendar, a hire, an appointment, a clean compliance file; two or three at most); the first regulatory or compliance dates inside the 90 days (renewals, CE, audits, filings, reviews); the one thing that could blow up the quarter and what I will do about it this week. Output the target, the must-exist items with dates, the regulatory dates, the biggest risk and first move. Each must-exist item becomes a parent task in my inventory.

Describe clients by pattern only. The coach replaces identifiers and tells you; you are still responsible for what you enter.

Weekly lead measures

The one or two weekly activities you control that predict the 90-day target.

Say	**lead measures**	10 minutes
Have ready	Your 90-day target.	
You get	One or two lead measures with weekly counts, a check-in day, and why each predicts the target.	

Paste into any AI chat

This prompt works on its own, without the starter pack.

Set my weekly lead measures. Ask me what activity, done weekly, most predicts my 90-day target; it must be something I can do on a Tuesday regardless of how anyone responds (discovery meetings held, referral asks made, case designs delivered, CPA lunches, review meetings with a planning question added). Ask how many per week, a number I have hit in a good week. Ask for a second one if there is one, two at most. Ask which day I check the count. A lead measure is never a dollar figure or a close; if I propose one, ask what activity produces it. Output the measures with counts, the check-in day, and one line each on why they predict the target.

Describe clients by pattern only. The coach replaces identifiers and tells you; you are still responsible for what you enter.

Task inventory with scores

Everything on your plate for 90 days, scored two ways so the morning card has something to pick from.

Say	`task inventory`	30 minutes
Have ready	Your to-do list in any form, the must-exist items, regulatory dates, stop-doing list, drains lists. Client tasks by type only.	
You get	A sorted table: task, money value, business value category and score, reactive or proactive, size, due date, dependencies. Top ten shown first.	

Paste into any AI chat

This prompt works on its own, without the starter pack.

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Build my task inventory. Let me dump every task I can think of; replace client identifiers with placeholders and say so once. Add my must-exist-by-day-90 items as parents and break each into two to five child tasks with me. Add my regulatory dates as tasks with due dates. For each task, ask or infer: money value in dollars over 12 months or none; business value as one category (Regulatory, Revenue, Pipeline, Capacity, Relationship) scored 1 to 5, with dated regulatory items a 5 by rule; reactive or proactive; size (under an hour, half day, full day, multi-day); due date if real; depends on. A task is a verb and an object that can be finished; split anything multi-day. Rank: dated regulatory 5 first, then highest business value that moves this week's lead measure, ties to money. Show the top ten and ask what is wrong.
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Describe clients by pattern only. The coach replaces identifiers and tells you; you are still responsible for what you enter.



The third of five modules

Run

One card a day. Three secondaries locked behind it.

Three skills, every day. Morning card, end-of-day close, Friday look back. Reactive versus proactive is tagged on every task.

Morning card

Skill 3.1 · 5 minutes

Every working morning. One thing to do today plus three secondaries locked until it is done. Requires the chain.

End-of-day close

Skill 3.2 · 2 minutes

Two minutes at the end of the day. A log entry, not a conversation.

Friday look back

Skill 3.3 · 10 minutes

After Friday's close. The week in numbers, then two questions.

Morning card

Every working morning. One thing to do today plus three secondaries locked until it is done. Requires the chain.

Say	**morning card** 5 minutes
Have ready	Yesterday's close. Anything new that landed.
You get	A card under 30 lines: the one with why, both scores, a time box, three to six steps and what done looks like; three locked secondaries with scores; today's proactive versus reactive split; your streak.

Paste into any AI chat

This prompt works on its own, without the starter pack.

Give me today's morning card. Load my One Thing statement, 90-day target, this week's lead measures and task inventory. Ask one question only: anything new since yesterday's close? Then pick the one: a dated regulatory item is a 5 and wins; otherwise the task with the highest business value that moves this week's lead measure, ties to money. Pick three secondaries by the same ranking, at least one proactive. Break the one into three to six verb steps that fit a time box; if it is bigger than a day, carry today's slice and say what remains. Card format: date; One Thing statement; lead measure progress; THE ONE with task, why today, money value, business value category and score, time box, steps, done looks like; SECONDARIES (locked until the one is done) with money, category score, reactive or proactive; today's split; streak; one line reminding me to say close tonight. Never swap the one because I feel like it; if I want to change it, ask what changed in the scores. If the same one has rolled three days, ask what is actually stopping it.

Describe clients by pattern only. The coach replaces identifiers and tells you; you are still responsible for what you enter.

End-of-day close

Two minutes at the end of the day. A log entry, not a conversation.

Say	**close** 2 minutes
Have ready	Honesty.
You get	One close line: done, partly or not; secondaries done; the reason class if not; streak; what carries to tomorrow.

Paste into any AI chat

This prompt works on its own, without the starter pack.

Run my end-of-day close. Ask: the one, done, partly, or not? If done, ask which of the three secondaries I also got to. If partly or not, ask what got in the way and classify it as interruption, too big, wrong task, avoidance, blocked, or unclear, without moralizing. Ask what must be on tomorrow's card. If I did something big that was not on the card, record it as unplanned work with scores. Update the week's lead measure count if the one moved it. Reply in one line: Close date: one done or partly or not; secondaries done n of 3; reason if not; streak x of last y; tomorrow carries items. Under ten lines total.

Describe clients by pattern only. The coach replaces identifiers and tells you; you are still responsible for what you enter.

Friday look back

After Friday's close. The week in numbers, then two questions.

Say	friday 10 minutes
Have ready	The week's cards and closes, in memory or the focus file.
You get	A scorecard: ones completed, secondaries, money attached, business value by category, proactive share, lead measure result, slip reasons, unplanned work, one pattern from the data, and next week's lead measure.

Paste into any AI chat

This prompt works on its own, without the starter pack.

Run my Friday look back from this week's cards and closes. Give me the scorecard first with no questions: ones completed of days worked; secondaries completed of issued; money value attached to completed tasks (12-month estimate); business value completed by category; proactive versus reactive percent; lead measure achieved of target; reasons when the one slipped by class and count; unplanned work that took a day, by type; one pattern you see, from the numbers only; next week's lead measure to confirm. Then ask two questions one at a time: which of these surprises me, and whether next week's lead measure stays or changes. If I want to lower the 90-day target, push back once if it is a retreat rather than a correction. No praise, no scolding. Every fourth Friday add one line comparing this month to last on ones completed and proactive share.

Describe clients by pattern only. The coach replaces identifiers and tells you; you are still responsible for what you enter.



The fourth of five modules

Protect

Keep clients out and your process yours.

Two skills. The PII scrub runs before everything. The SOP writer turns a process only you know into a procedure your staff can run.

PII scrub (always on)

Skill 4.1 · Automatic

Runs before every other skill on every message and file. You never invoke it.

SOP writer

Skill 4.2 · 20 minutes

Turns a process only you know into a procedure your staff can run, marked proprietary to your firm.

PII scrub (always on)

Runs before every other skill on every message and file. You never invoke it.

Say	**Runs automatically** Automatic
Have ready	Nothing. The coach does this.
You get	Client identifiers replaced with placeholders, one line telling you what was replaced, and the task continued.

Paste into any AI chat

This prompt works on its own, without the starter pack.

Before you do anything with my message or files, scan for client-identifying information: a person's name tied to a case, Social Security or tax ID numbers, account or policy numbers, dates of birth, street addresses, phone numbers, email addresses, health conditions tied to a person, exact dollar figures on a named case, employer names that identify a small household. Replace each with a placeholder that keeps the meaning (Client A, a business owner in her 50s, a seven-figure case). Tell me in one line what you replaced, then continue. Keep carriers, products, strategies, my own business numbers, counts, averages and ranges. Never save the originals to memory. If an uploaded file is mostly client data, read only its structure and tell me not to upload client documents here again. If I say it is fine to use the name, say once that the program rule is no client identifiers and proceed with placeholders. Daily task lines may use a client first name; never store or repeat it elsewhere.

Describe clients by pattern only. The coach replaces identifiers and tells you; you are still responsible for what you enter.

SOP writer

Turns a process only you know into a procedure your staff can run, marked proprietary to your firm.

Say	**write an SOP for** 20 minutes
Have ready	One process you did at least twice this month.
You get	A one-page SOP: owner, trigger, target time, done-when, numbered single-verb steps with tool, time, owner and check, common failures with fixes, hand-offs, and a confidentiality footer.

Paste into any AI chat

This prompt works on its own, without the starter pack.

Write an SOP for the process I name. Interview me one question at a time: the process name and the moment it starts; a step-by-step walk through the last time I did it with the tool or form and rough time per step, describing any client by role not name; which steps someone else could do with instructions; where it goes wrong; how I know it is finished; who should own it by role. Produce: firm name; SOP title, version 1.0 and date; owner, trigger, target time; done when; numbered steps each with one verb, tool or form, time, owner and a check; common failures and the fix; hand-offs; footer reading Confidential and proprietary to my firm, internal use only, not for distribution. Mark steps only I can do as Principal. Split any step with an and.

Describe clients by pattern only. The coach replaces identifiers and tells you; you are still responsible for what you enter.



The last of five modules

Grow

When you want more, Finnec is one link away.

Three skills, mostly automatic. One offer a week at most, only when you are stuck or a task is a strategy Finnec already runs.

Nudge rules

Skill 5.1 · Automatic

When and how Finnec is offered. Only inside the morning card and Friday look back. The only module that names Finnec.

Finnec strategy match

Skill 5.2 · Automatic

Used by the nudge rules. When a task or client need matches a strategy Finnec runs, the coach names the match and gives the link, nothing more.

Secret Sauce handoff

Skill 5.3 · 20 minutes

Turns the completed questionnaire into a two-page paper in your voice and, if you want to be listed, a one-page vendor summary.

Nudge rules

When and how Finnec is offered. Only inside the morning card and Friday look back. The only module that names Finnec.

Say	**Runs automatically**	Automatic
Have ready	Nothing. The coach follows the rules.	
You get	At most one two-line offer per week, only when a trigger fires: stuck three days, a task matches a Finnec strategy, capacity tasks keep winning, two weak weeks, an SOP written, day 30 and 90. Declines are remembered.	

Paste into any AI chat

This prompt works on its own, without the starter pack.

Offer Finnec only when one of these fires: the same one has rolled over three days or the close said unclear or blocked two days running; today's task matches a strategy Finnec runs; three of my last five ones were Capacity tasks; two consecutive Fridays under 3 of 5; I just finished an SOP; day 30 or day 90 of the program. Caps: one offer in any seven days, never two days in a row, never on a day I completed the one (stuck is the exception), never inside Identify, Engineer or Protect. If I declined a topic, that trigger is silent 60 days; if I say stop offering Finnec, all are silent until I say offer Finnec again. The offer is two lines at the bottom of the card: the specific problem and what Finnec would do about it, then the link finnec.net/#apply?ref=CODE with the door to pick. Nothing else. Record date, trigger, and any decline.

Describe clients by pattern only. The coach replaces identifiers and tells you; you are still responsible for what you enter.

Finnec strategy match

Used by the nudge rules. When a task or client need matches a strategy Finnec runs, the coach names the match and gives the link, nothing more.

Say	**Runs automatically** Automatic
Have ready	Nothing.
You get	A match named in the morning card offer when caps allow, otherwise listed in the Friday look back as strategies touched this week.

Paste into any AI chat

This prompt works on its own, without the starter pack.

Finnec runs or lists these strategies: cost segregation; 1031 exchange full or partial; 453 installment and structured sale; Section 280A rental to the owner's business; MSO and shared services; business trusts and management companies; soil fertility and legacy nutrient deductions on farmland; solar and energy credits; oil and gas non-operated working interests; defined benefit and cash balance plans; 401(k) and qualified plan design; nonqualified deferred compensation, SERP, rabbi and secular trusts; key person, split dollar and death benefit only; asset-based long-term care for owners; buy-sell agreements of every form; business succession; family office and CFO services; whole life cash value as a down-year income buffer; business funding for operations; income property acquisition and leverage analysis; real estate portfolio review; sale versus 1031 modeling; mineral and royalty interests; layered plans for a big one-year tax bill; securities-backed lines of credit. A task or client need matches when my words name the strategy, the asset, or the problem it solves. One match per card. Never state returns, fees, or legal or tax conclusions, or name the specialist.

Describe clients by pattern only. The coach replaces identifiers and tells you; you are still responsible for what you enter.

Secret Sauce handoff

Turns the completed questionnaire into a two-page paper in your voice and, if you want to be listed, a one-page vendor summary.

Say	secret sauce handoff · 20 minutes
Have ready	Your fifteen questionnaire answers.
You get	A paper under 900 words in flowing paragraphs, marked proprietary to your firm, plus a structured vendor summary ready to upload at finnec.net/#apply under Specialist.

Paste into any AI chat

This prompt works on its own, without the starter pack.

Turn my Secret Sauce questionnaire answers into two documents. First run the PII scrub and report replacements. Paper: my name and firm as the title, my Edge statement as the opening line, then five sections in flowing paragraphs with no bullets: who I serve and what triggers the call; what I do that others do not; my process step by step with time per step; what I refuse to do; what I want to be known for. Under 900 words, in my phrasing, tightened not rewritten, footer: Confidential and proprietary to my firm, date, v1. Vendor summary, structured: name, firm, states, licenses; specialty in one line; ideal client pattern in two lines; trigger events; process steps with days and owner; documents an engagement needs; sign-offs required; carriers, products and structures used most; what is confidential to my firm; what Finnec may use. Respect answer 15: if nothing may be shared, produce the paper only. Then tell me where to upload: finnec.net/#apply?ref=CODE, Specialist door.

Describe clients by pattern only. The coach replaces identifiers and tells you; you are still responsible for what you enter.

A morning card, filled in

Illustrative. Figures are examples, not a promise of results.

Tuesday, November 17 Streak: 6 of the last 8 days

One Thing: Run two business-owner discovery meetings a week with a CPA referral attached.

This week's lead measure, discovery meetings — **1 of 2**

The one

Call the two CPAs from the October lunch and ask each for one owner introduction this month.

Why today: the week's second meeting has to be booked by Thursday to hold the pace to the 90-day target.

Money value	**$18,000 over 12 months (two owner cases at your average)**
Business value	**Pipeline 4**
Time box	**9:00 to 9:45 (45 minutes)**

Steps

1. Open the two CPA notes from Identify 1.5 and the sentence they used to introduce you.
2. Call CPA one; ask for one owner with a buy-sell or succession question.
3. Call CPA two; same ask.
4. Log both calls and any name by first name only in today's card.
5. Send each a two-line thank you with one thing you can do for their client this quarter.

Done looks like: two asks made, at least one introduction promised.

Secondaries		Locked until the one is done	
Finish the CE module due Nov 30	none	Regulatory 3	proactive
Write the review-meeting SOP, step list only	$6,000	Capacity 3	proactive
Return the carrier's underwriting request on the pending case	$4,200	Revenue 3	reactive

Today's split: 3 proactive, 1 reactive

Tonight: say “close” and tell me done or not.

The Secret Sauce questionnaire

What makes you the best in the room

Fifteen questions. Thirty to forty-five minutes. Rough is better than polished.
No client names, numbers or exact case figures; describe cases by pattern.
When finished, give the answers to the coach and say “secret sauce handoff”.

The work only you do

1. The case you would want on your tombstone. Describe it by pattern. What did you do that another advisor would not have?
2. The question clients ask you that nobody else gets asked. Why do they bring it to you?
3. What you refuse to do, and why. Products, clients, structures, fee arrangements.
4. Your process from first call to delivered result. Step by step, with roughly how long each step takes and who does it.
5. Which step in that process only you can do today? What would it take for someone else to do it?

The toolkit and the market

The toolkit

6 The carriers, products and structures you reach for first, and why those.

7 How you price. Where you leave money on the table on purpose, and why.

8 The specialists you bring in (CPA, attorney, actuary, TPA, QI, valuation) and at what point. Which one do you wish you had on call and do not?

The market

9 Who sends you business, and the sentence they use when they introduce you.

10 The mistake you see most often in other advisors' work in your area.

11 Where you lose cases, and to whom.

The future, and permissions

The future

12 The one thing you would teach a new agent on day one.

13 What you would build if you had a CFO, a CPA and an attorney on call for your practice.

14 What you want to be known for in five years, and who you would want to refer out to get there.

Permissions

15 Of everything above, what may Finnec use to build your listing and match you with clients and strategies, and what stays with your firm only? Name the sections or say all or none. You can change this later.

Your memory, on paper

If your AI does not keep memory between chats, or you want a copy you own, keep this focus file in your notes app. Paste it at the start of each day; the coach returns it updated at the close. No client names belong in it.

Focus file · {your name} updated {date}

Referral code	CODE
Edge	{one sentence}
One Thing	{one sentence}
Set on	{date}
12-month outcome	{metric} from {today} to {target} by {date}
Guardrails	{two or three}
Stop doing	{items}
90-day target	{metric} to {value} by {date}
Must exist by day 90	{item (date)}; {item (date)}; {item (date)}
Regulatory dates	{item (date)}; ...
Biggest risk / first move	{line}
Lead measures this week	{activity} x {n}; {activity} x {n} Check-in: {day}
Progress this week	{n} of {n}; {n} of {n}

Task inventory (top 15, by type, no names)

task	money (12 mo)	category score	re/pro	size	due	depends on
...	...	...	...	...	...	...

Last 7 cards

date	the one (type)	done?	reason if not	secondaries done
...	...	...	...	...

Streak {x} of last {y}

Friday scorecards (last 4)

week	ones	secondaries	$ attached	proactive %	lead measure	pattern
...	...	...	...	...	...	...

SOPs written	{name v1 (date)}; ...
Nudges	count {n} | last {date} | declined topics {topic (date)} | all off: {no}
Program day	{n}



The program is free. Finnec is the next step.

Everything in this paper is yours at no cost. Finnec itself is a full platform for advisors: one client record for the owner, the business and the family, more than 600 strategies scored for each household, workflows that turn a yes into assigned tasks, and specialists you can bring in without losing the client. Three ways in, all at the same link.

Refer a colleague

Know another advisor or a business owner who should see this? Send them our way and we spend 30 minutes building your system with you, free. A thank-you, not a fee.

List as a specialist

You run a strategy few others do. We draft your listing from your documents, you certify it, and Finnec's advisors and their clients can find you.

Get the full platform

Book time with our team. We look at your practice, set up your One Thing system, and show you Finnec as your CRM and planning platform if it fits.

Apply at finnec.net/#apply

Scan or visit, then pick Financial professional.
Your referral code is in your welcome email.

The Finnec One Thing program is a practice-development tool for licensed financial professionals. It is not financial, legal, tax, or compliance advice, and nothing produced in it is reviewed by any compliance department. Do not enter client-identifying information anywhere in the program: no names tied to a case, Social Security or tax ID numbers, account or policy numbers, dates of birth, addresses, phone numbers, email addresses, health information, or exact dollar figures on a named case. Describe your work by pattern (Client A, life stage, product type, rounded ranges). The coach is instructed to strip identifiers and tell you what it removed, but you are responsible for what you enter. Your broker-dealer, RIA, or insurance carrier rules on AI tools, outside business activity, and advertising apply to you and are not changed by this program; clear your use with your compliance officer. Information you submit to Finnec is used to set up your account, send you the starter pack, and, if you consent, to build your listing and match you with clients and strategies. Documents you upload are held as reference only and are not shared with other members. Finnec is a product of Advisorist, LLC. The One Thing program draws on widely published focus and productivity ideas and is not affiliated with or endorsed by any book, author, or publisher.

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