

Winning is a habit.  
Unfortunately, so is losing.  
-Vince Lombardi



# WINNING HABITS OF SUCCESSFUL FINANCIAL ADVISORS

A presentation by Amit Trivedi  
Author, Blogger, Trainer

# Qualities or Habits?

What is more important?



*"We are what we repeatedly do.  
Excellence, then, is not an act  
but a habit."*

*- Aristotle*

What makes one a winner



**Winning Mindset**

**&**

**Winning Habits**



I always knew I was going to be rich. I don't think I ever doubted it for a minute.

- Warren Buffett

Winning mindset

A close-up photograph of a person's hands, wearing a dark blue suit jacket and a light-colored shirt, tearing a piece of white paper. The paper is split into two pieces, and the word "IMPOSSIBLE" is printed in large, bold, black capital letters across the tear. The left piece of paper shows the letters "IM", and the right piece shows "POSSIBLE". The background is a plain, light gray color.

**IMPOSSIBLE**

What you want

What they want



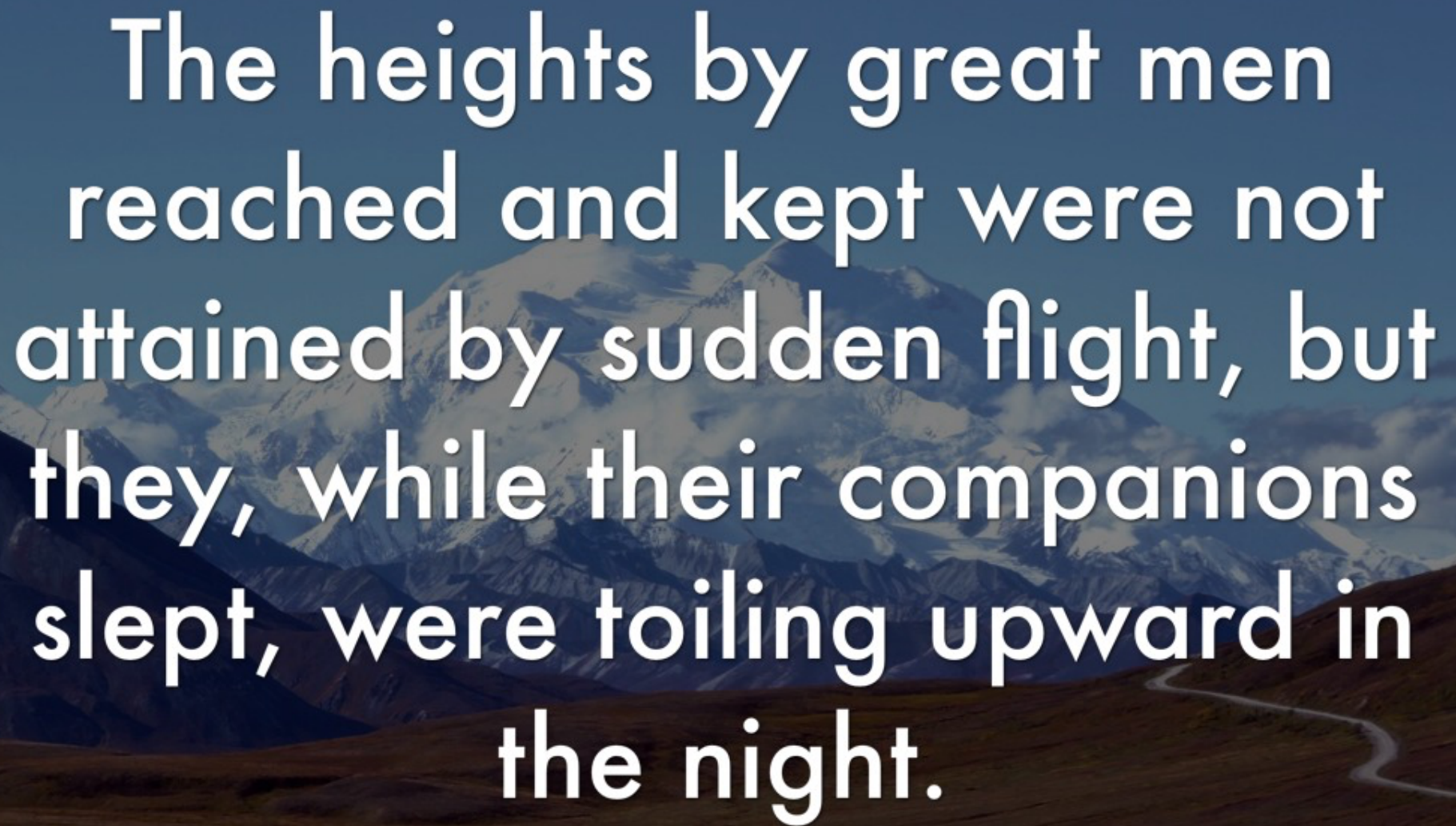
win/win





*"We first make our habits, and then our habits make us."*

**Winning Habits**

The background of the image shows a vast, rugged mountain landscape. In the foreground, a dark, brownish hillside slopes upwards from the bottom right towards the center. A thin, light-colored path or road winds its way up this slope. In the middle ground, a range of dark, jagged mountains stretches across the frame. The peaks and ridges of these mountains are covered in patches of snow or light-colored rock. The sky above is a deep, clear blue, suggesting a clear day. The overall scene conveys a sense of scale and the challenges of mountain climbing.

The heights by great men  
reached and kept were not  
attained by sudden flight, but  
they, while their companions  
slept, were toiling upward in  
the night.

Henry Wadsworth Longfellow

# They control their calendar





Fortune favors the prepared mind.

(Louis Pasteur)

# They set goals – personal & business

The Victory of Success Is Half Won  
When One Gains The Habit of  
Setting and Acheiving Goals

~ Ogr Mandino

They track progress of **activities**



They contemplate

**“IT TAKES AN EXTRAORDINARY INTELLIGENCE  
TO CONTEMPLATE THE OBVIOUS.”**

**ALFRED NORTH WHITEHEAD**

# Putting the customer first ...

"When the customer comes first, the customer will last."

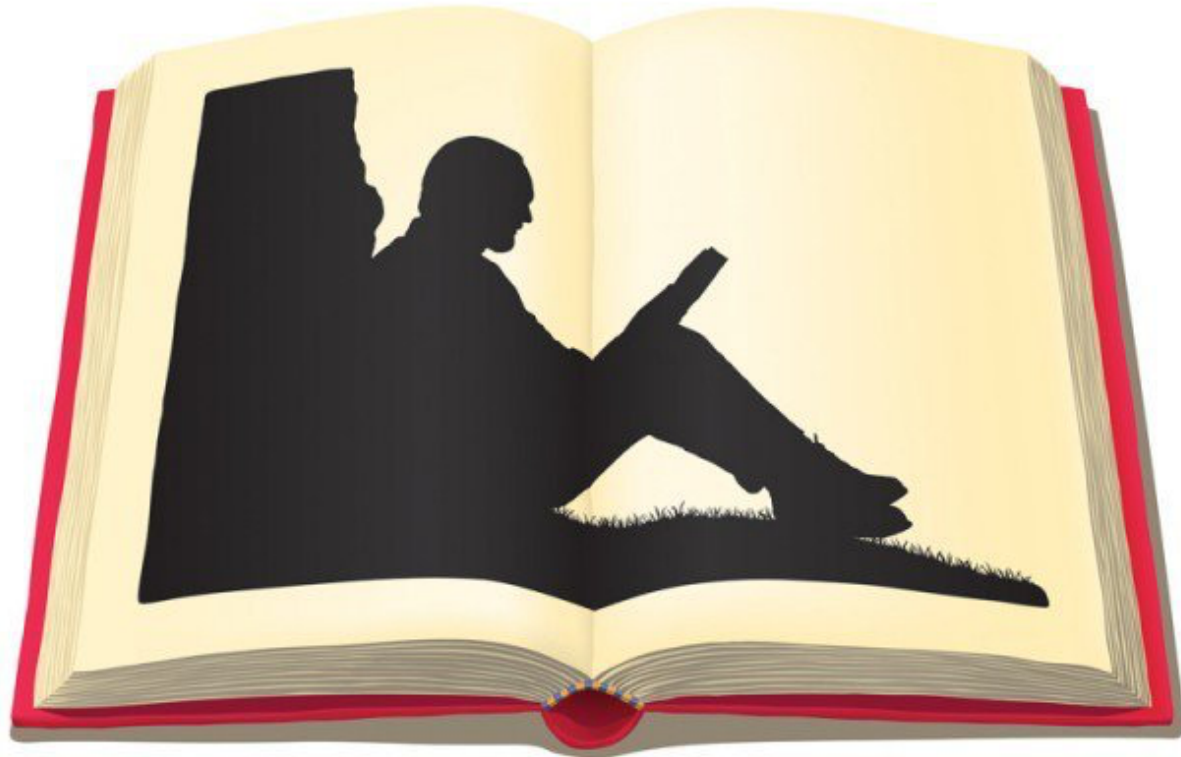
-Robert Half



**Regularly** communicate with their clients



# They read books, regularly



They turn to experts, when in doubt

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***The more I know,  
the more I realise  
how little I know***

"We first make our  
habits, and then our  
habits make us."

# Thank you

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