
Advisors Adopt Healthy Habits To Boost Morale And Avoid Burnout



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More than one month into 2019, a New Year's resolution to get healthier gets put to the test. The temptation to revert to old habits can prove too hard to resist.



For many advisors, a commitment to health and wellness can extend their careers while making their daily routine more fulfilling. But that requires ongoing discipline and motivation.

Perhaps the greatest concern about embracing a healthy lifestyle is finding the time to devote to exercise. That's why some advisors spring into action early every morning.

"I get up at 5 a.m. and I go to the gym every day, usually at the crack of dawn," said Marnie Hards, a certified financial planner in Morris Plains, N.J. "I'm there 45 to 50 minutes, with 30 minutes of cardio and 15 minutes of weights."

Her morning workout is just the start. For the last two years, Hards has used a standing desk with an adjustable height that slides up and down. She usually spends about half of every workday in the standing position.

She also squeezes in a 10-minute meditation, usually after lunch, using the Calm mobile app. She turns off her phone, sits on a couch in her office and follows the prompts.

"It's a reminder not to sweat the small stuff. You can feel your body changing," she said. "Your body settles and you come back into the world as a more contented being."

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When pursuing healthy habits, advisors may focus on physical activities. But as Hards has found, the mental side is equally important.

The risk of burnout goes hand-in-hand with emotional exhaustion. If you're rushing around trying to do too much while neglecting your diet, you can dig yourself into a hole.

Mindfulness involves directing your attention to the present moment with clearheaded acuity. But it doesn't happen by accident.

"It helps to stop before a meeting and clear your mind for one or three minutes," said Cicily Maton, a Chicago-based certified financial planner. "If you come into a meeting still reacting to the last meeting, you're not there for the client."

In terms of physical exertion, Maton raves about an often overlooked type of exercise: speed walking. She's a fan of what she calls "race walking" for at least 30 minutes daily.

"It's a walking meditation in itself," she said. "It's not just walking fast. It's stylized. One foot must always be on the ground. It improves your posture while you get your cardio."

Like Hards, Maton meditates daily. She usually does it for 20 minutes every morning with her husband; both are trained in Transcendental Meditation.

"It's a great discipline to clear your mind," she said. "And anything you do with others heightens the opportunity for you to do it more often."

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For advisors who prize keeping fit, they may want to encourage others to hop on the bandwagon. But preaching the need to exercise can fall flat.

A better strategy is to make it easy for colleagues to join you for heart-healthy activities. If it's convenient for them, they're more apt to follow through.

Rebecca Bast, an advisor with Northwestern Mutual, promotes wellness at her firm in Lutz, Fla. For starters, she uses an exercise bike and invites others to try it out.

"It's in one of the offices, and I'll pedal on it during a call," Bast said. "It's used throughout the week."

She also purchased personal training sessions for her team and hired a nutritionist to conduct one-on-one workouts with employees. Once a week, she provides lunch for her staff of seven people from a local organic eatery.

For the past 15 years, Bast and her business coach have prioritized mental and physical fitness. During their annual planning sessions, they focus on exercise as a key element of the year ahead.

To challenge herself to get healthier, Bast and her coach set ambitious goals. For example, in late 2017 she decided to do push-ups daily.

"I only could do three at first," she recalled. "But I did them almost every morning. The other day I did 41. My goal is to do my age (48)."

For Bast, efficient time management begets a healthier lifestyle. She acknowledges that advisors can experience burnout if they work themselves too hard for too long.

"That's why every Friday at noon, we close our office," she said. "If there's an emergency, we'll deal with it (on Friday afternoon). But it helps with everyone's mental strength to work really hard and then take this time off."