



DOCUMENT HOW YOU SPEND YOUR TIME

For each of the following categories, place an 'X' for each hour you spend on that activity for each day of the week. (E.g. if you spend 3 hours on Financial Planning a day, there would be 3 Xs in that category)

I spend _____ (total) time on
Client-Facing Activities.

CSI = Client Service Issues ; FP = Financial Planning; P = Prospecting; MP = Meeting Prep; CM = Client Meetings

I spend _____ (total) time on
Investment Management.

IDM = Investment Research, Due Diligence, & Monitoring; MAC = Setting Up/Adjusting Model Allocations for Clients; TR = Trading & Rebalancing

		1	2	3	4	5	6	7	8	9	10
M	CSI										
	FP										
	P										
	MP										
	CM										
Tu	CSI										
	FP										
	P										
	MP										
	CM										
W	CSI										
	FP										
	P										
	MP										
	CM										
Th	CSI										
	FP										
	P										
	MP										
	CM										
F	CSI										
	FP										
	P										
	MP										
	CM										

		1	2	3	4	5	6	7	8	9	10
M	IDM										
	MAC										
	TR										
Tu	IDM										
	MAC										
	TR										
W	IDM										
	MAC										
	TR										
Th	IDM										
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	TR										
F	IDM										
	MAC										
	TR										

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For each of the following categories, place an 'X' for each hour you spend on that activity for each day of the week. (E.g. if you spend 3 hours on Administrative Tasks a day, there would be 3 Xs in that category)

I spend _____ (total) time on
Training & Professional Development.

	1	2	3	4	5	6	7	8	9	10
M										
Tu										
W										
Th										
F										

I spend _____ (total) time on
Administrative Tasks.

	1	2	3	4	5	6	7	8	9	10
M										
Tu										
W										
Th										
F										

If you'd like to discuss ways you can focus more time on Client-Facing Activities, contact one of our Business Development Consultants at:

1-800-408-2423 or Support@semwealth.com