WIPFLI

2024 PERSPECTIVES IN FINANCIAL SERVICES



3 TYPES OF LEADERS

Accidental	LEADERS

Incidental LEADERS

Intentional LEADERS



LEADERSHIP DEFINED

LEADERSHIP IS NOT position

LEADERSHIP <u>IS</u> THE ABILITY TO <u>offer</u> <u>service</u>

AND THE WILLINGNESS TO <u>take</u> <u>action</u>.

PRACTICAL LEADERSHIP IN ACTION

- 1. Take time to think
- 2. Make a plan
- 3. Communicate the plan
- 4. Execute the plan



2 OVERARCHING LEADERSHIP EXPECTATIONS

- 1. Solving problems
- 2. Making decisions

5 BASES FOR DECISION MAKING SUCCESS

- 1. HAVE THE __tools____.
- 2. KNOW THE <u>rules</u>.
- 3. Position YOURSELF APPROPRIATELY.
- 4. MASTER YOUR <u>timing</u>.
- 5. MAKE THE <u>decision</u>.

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EMPOWER



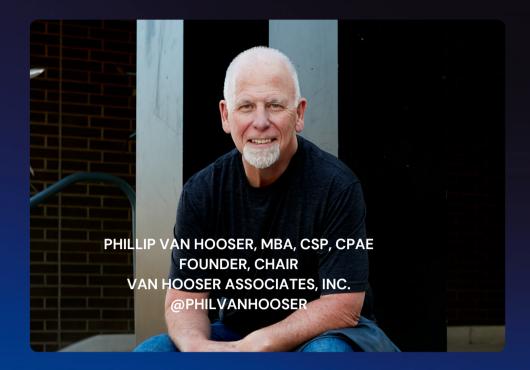
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LIVING & LEADING BY YOUR VALUES

1. LEAD __intentionally______.
 2. __Interact ______ HONESTLY.
 3. LISTEN __intently_____.
 4. __Communicate ____ COURAGEOUSLY
 5. EVOLVE __constantly_____.
 6. __Love _____ UNCONDITIONALLY.

Respect: Consistency, quality decision making, ability to interact with everyone.





PHILLIP VAN HOOSER, MBA, CSP, CPAE HAS BEEN INSPIRING
AUDIENCES TO CHOOSE INTENTIONAL LEADERSHIP FOR OVER 35
YEARS. A MASTERFUL STORYTELLER, HE USES RELEVANT
EXAMPLES FROM HIS REAL-LIFE WORK EXPERIENCE TO DELIVER
COMMONSENSE LEADERSHIP PRINCIPLES CENTERED ON
PRACTICAL APPLICATION.

THROUGH HIS PARTICIPANT-FOCUSED, CONVERSATIONAL DELIVERY, HE EFFORTLESSLY ENGAGES EVERY LEADER IN THE ROOM, LEAVING THEM EAGER TO APPLY THE STRATEGIES, MINDSET, AND METHODS THAT WILL EQUIP THEM TO LEAD MORE EFFECTIVELY.

PHIL SUPPORTS CURRENT LEADERS AND EQUIPS FUTURE LEADERS TO DEVELOP THE INTENTIONAL LEADERSHIP HABITS THAT DRIVE LASTING RESULTS. IT'S AN APPROACH REFINED OVER 35+ YEARS IN LEADERSHIP DEVELOPMENT, CREATING A DISTINCTIVE PATHWAY FOR PREPARING LEADERS WHO ARE READY, WILLING, AND ABLE TO LEVEL UP THEIR PERFORMANCE WITH INTENTIONALITY AND CONFIDENCE.