



A Navy SEAL's secrets of success under conditions of uncertainty

Investments are not FDIC-insured, nor are they
deposits of or guaranteed by a bank or any other
entity, so they may lose value.

For financial professionals only.
Not for use with the public.

RPGEPO-162-0925 CGD/10047-S109712



Jonathan Wilson

Capital Group

Advisor Practice Management Consultant

- Deployed: Afghanistan, Iraq, Africa, Europe, South America
- 200+ combat operation missions
- 1 of 16 of the original 216 to graduate Basic Underwater Demolition/SEAL training



HIGH
PERFORMING
TEAMS

MISSION

SYSTEMS

CULTURE

MISSION





KNOW YOUR ROLE

Empowerment through clarity

- Clearly defined roles and responsibilities
- Clearly defined rules of engagement
- Clear channels of communication

Roles and responsibilities

Platoon leader

ROLE

Responsible for what the platoon does or fails to do. Duties include tactical employment, training, administration, personnel management and logistics.

RESPONSIBILITIES

- Creates schedules
- Communicates up and down the chain
- Plans with key personnel
- Directs and assists the team leaders in planning and coordinating
- Reviews the latest lessons learned
- Conducts rehearsals
- Overall in charge

Advisor

ROLE

Help clients (both corporate and individual) meet their goals of a sustainable saving and investment program leading to their ability to live a productive and enriching retirement.

RESPONSIBILITIES

- Investment menu construction
- Employer and employee education
- Investment due diligence
- Vendor search and selection
- ERISA knowledge and deployment
- Business building and client acquisition
- Compliance and other home office obligations

SYSTEMS:

Plan for the
unexpected



The 4 P's of Mission Planning

1. PROBLEM

2. PLAN

3. PERFORM

4. PROBE

Plan for the unexpected





Schedule after action reviews (AARs)

- What was supposed to happen
- What actually happened
- Pros/Cons
- How to fix it

Keep it real

- Mandatory participation
- Feedback process
- Shared learning

Never make the same mistake twice



CULTURE:

Get comfortable
being uncomfortable



CULTURE:

Give someone
purpose and watch
them change the
world



“If you ask people what their vision is, it's not, 'Hey, I'm here cutting this stone.' It's, 'I'm part of a team building a cathedral.’”

– Gen. Stanley McChrystal



KITCHEN

Menu

Sun Spag Squash Pasta
with Salad
and Potatoes
Bread

Mon Chili - EIK

Tues Chicken Wings, Sweet Potatoes
Fries & Salad

Wed Salmon Salad
with Quinoa

Thurs Venison Steak, Cauliflower
rice & Veggie

Schedule	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Daddy		Game					
Mommy	Holiday "	Carrots man's	OFF School - 12th Street		10:00-11:00 AM Lunch Baking	Fruit here	
Madison							
J.D.		Nice mimosas 3pm		Baking St. Karing 5:30	Haircut	10:00-11:00 AM Baking	10:00-11:00 AM Baking
Lily		Ride	Extra 10:00-11:00 AM Chorus 10:00	House Call	10:00-11:00 AM Baking		
Charley		Soccer 4:30pm	Chorus 10:00				
Alex		Low 7-8pm	Spotted Ficus - 10:00			Family 5:00pm	
Laundry 8:00 AM & Electronics 7 PM - Bedtime 10:00 PM After HW is done & Clean Rooms & 11:00 AM Bed 11:00 PM 12:00 AM Bed 12:00 AM							

Chores	Wash Dishes	Dry Dishes	Feed Fish	House Shells	Feed Lilies	Feed Dogs	Water Plants	Get Mail	Wash Car	Wash Dishes	Feed Lilies	Feed Fish	Feed Lilies	Feed Fish	Feed Lilies	Feed Fish	Feed Lilies	Feed Fish	Feed Lilies
Monday	M	*	W	C	L	W	L	C	A	A	W	J	A	W	C	M	J	W	W
Tuesday	W	C	J	W	L	M	C	A	D	L	W	L	A	L	A	J	L	D	J
Wednesday	D	L	L	A	A	L	A	D	W	J	W	C	C	C	L	C	C	C	C



HIGH
PERFORMING
TEAMS

MISSION

SYSTEMS

CULTURE

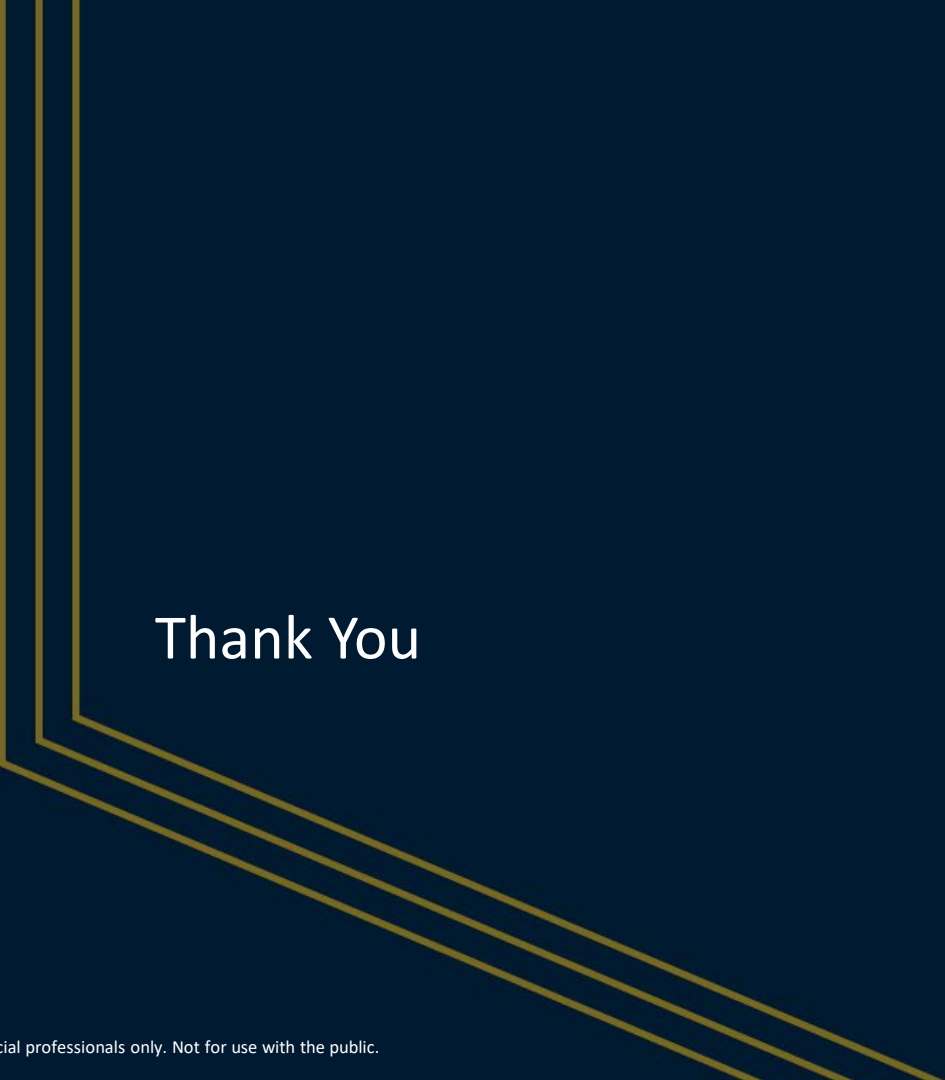
Important Information

Statements attributed to an individual represent the opinions of that individual as of the date published and do not necessarily reflect the opinions of Capital Group or its affiliates. This information is intended to highlight issues and should not be considered advice, an endorsement or a recommendation.

All Capital Group trademarks mentioned are owned by The Capital Group Companies, Inc., an affiliated company or fund. All other company and product names mentioned are the property of their respective companies.

"Navy SEAL" and the "SEAL Trident" are the property of the United States Navy. This presentation is not sponsored by, affiliated with or endorsed by the U.S. Navy.

This content, developed by Capital Group, home of American Funds, should not be used as a primary basis for investment decisions and is not intended to serve as impartial investment or fiduciary advice.

Three parallel gold lines forming an L-shape in the top-left corner, extending diagonally across the slide.

Thank You