



FINANCIAL PLANNING, INC.

**IN THIS ISSUE:**  
Meet New Hire: Sheryl Jakel

## Firm Update

Hello, Summer! Schools are out around the country and the sun is shining. I don't know about you, but we have our summer plans all worked out and on the calendar. We are ready! It is nice to have a little down time to rest, relax, and enjoy the sunny days.

We are still interviewing for the right person to take advantage of our New Support Advisor's career track. We are in search of a talented candidate from the many academic programs offered in personal financial planning. If you know of an up-and-coming person in the financial field, we would love the opportunity to get an introduction to see if they are a good fit for this wonderful opportunity.

We would also like to welcome our new Client Service Specialist, Sheryl Jakel, to the team. You can find out more about her in the Associate Spotlight on page 3.

On a personal note, Bill will be on vacation from July 18th through August 12th. If you need any assistance while he is out, Tammy will be more than happy to help you in any way she can.

There are a few days you need to mark on your calendar for the upcoming quarter: Labor Day is Monday, September 5th and Grandparent's Day is Sunday, September 11th.

As always, we hope that you take the time to enjoy the long summer days and time with your family.

*Bill and Tammy*

## Some interesting facts about PERSONALITY...

Personality traits **form at an early age** and are **fixed by early adulthood**. How social you are is largely driven by the **amount of dopamine in the brain**, the feel-good hormone.

Those with high levels of dopamine tend to be **introverts**.

Those with lower levels of dopamine tend to be **extroverts**.

Most people's levels don't reach these extremes and fall someplace in the middle. They are called **ambiverts**.



## Introvert, Extrovert, or Ambivert

### WHICH ONE ARE YOU?

We have all heard the terms introvert or extrovert to describe someone's personality. In 1947, psychologist Hans Eysenck coined the term ambivert. This is a person that floats someplace in the middle, showing qualities of both introversion and extroversion. What most people don't realize is that personality is not as simple as a two-sided card. It is a spectrum. Personality traits exist along a continuum, and the majority of us fall somewhere in the middle.

Others judge our personality type based on facial expressions and structure. Does someone look happy, sad, or neutral? Do they get excited to be in the crowd or do they just observe from the sidelines? We can determine our own personality type by answering some basic questions.

- I am drawn to people, get energy from social gatherings, and am pretty outgoing. (*Extrovert*)

Continued on page 2

•It's draining to be around lots of people. I prefer peace, solitude, and quiet time. I usually crave alone time in my free time. (*Introvert*)

•It depends. (*Ambivert*)

There are much more in-depth "self-tests" that can be found on the internet. By understanding better where you fall on the personality scale, you can gain insight into your tendencies and preferences, which increases your self-awareness and emotional intelligence. This will help you improve performance in all areas of your life. In a research project conducted by TalentSmart, it showed that individuals who are the top performers at work are also highly self-aware of their personality traits.

#### Traits of an ambivert:

- Flexible and adaptive to surroundings and context.
- More of a balanced personality than the other extremes.
- Easier time adjusting their approach to people based on the situation.
- They connect more easily, and more deeply, with a wider variety of people.
- Intuitive about when to speak up and when to hold back, when to observe and when to respond.

#### Ways to make being an ambivert work for you:

- Build your schedule and your time around the types of situations in which you thrive.
- Make plans to be around others that bring out the best in you.
- Know when to flexibly use the traits that serve you and your current situation.
- Use time blocking to limit the time you have to spend in draining situations or with toxic people.
- Have an exit strategy in place to allow you to get out of these situations if they run too long.

Just remember that there are no right or wrong personality types – just different. Determine where you are on the scale. Learn more about what makes you tick and figure out how to make it work for you.

**“ Your smile is your logo,  
your personality is your business card,  
how you leave others feeling after  
an experience with you  
becomes your trademark.”**  
– Jay Danzie

## ▶ Continuous Improvement

▶▶ Bill attended the *Turning Point Conference* in **March 2016** held in Atlanta, GA.

It was time well spent with like-minded professionals full of information.



▶▶ Bill also attended the *Financial Planning Association Retreat* in **April 2016** in Phoenix, AZ.

**“ This was a very good conference that had many significant takeaways.”**  
– Bill



## GET TO KNOW US: New Hire: Sheryl Jakel



**Sheryl Jakel**  
Client Service Specialist

### How did you make the shift from higher education into the financial industry?

I was looking to re-enter the workplace after a 12-year gap. My focus has been on raising children and volunteering in the community. Sound Financial Planning offered the right balance between career and family that I was looking for.

### What are you most excited about while working for Sound Financial Planning?

I am excited to get to know the clients and build relationships with them.

### Tell me more about your family?

I have been married for 22 years and I have two sons ages 14 & 11.

### What do you like to do in your free time?

I love gardening, boating and fishing with my family. I also love to bake!

### Where is your favorite place to travel/visit?

My family loves to go to Maui. Snorkeling with the turtles is one of my favorite things to do there.

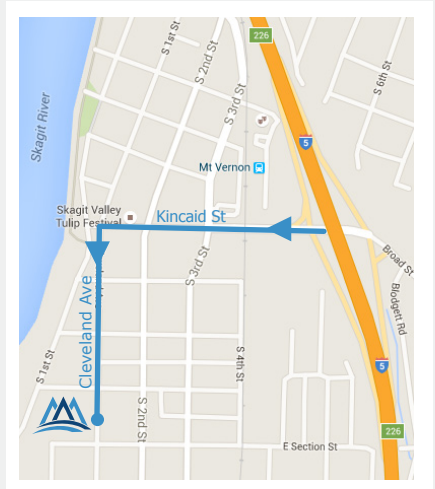
### Is there a story or fact you would like to share about your climb of Mount St. Helens?

Climbing to the Summit of Mount St. Helens was AMAZING! No technical climbing training required, but I did spend 6 weeks training for it. I was surprised at the size of the boulders that my friends and I had to climb over. It was a bonding experience for sure. The last section through the ash field was very slow, but the views were incredible. I highly recommend this hike and would definitely do it again with my family when my boys are a little older.

## We're Moving

In August, we will be moving to a new location for our Mt. Vernon office:

**1111 Cleveland Ave  
Suite 101  
Mt. Vernon, WA**



### I-5 Southbound

Take exit 226  
Turn right onto WA-536  
W/E Kincaid St  
Continue straight  
Turn left onto Cleveland Ave  
Go 3 blocks, our office is on the right  
in 1111 Cleveland Avenue Building

### I-5 Northbound

Take exit 226  
Turn left onto WA-536  
W/Broad St/E Kincaid St  
Continue straight  
Turn left onto Cleveland Ave  
Go 3 blocks, our office is on the right  
in 1111 Cleveland Avenue Building

## Bill's Take Aways from the FPA Retreat

▶▶ There was a session with the author, *James Clear* on transforming habits.

He discussed the science on how to stick with good habits and break bad ones. Did you know that on average it takes 66 days to form a new habit?

He also provided a user-friendly framework for overcoming procrastination, improving your consistency, and building habits that actually stick.

▶▶ There was also a session on the term **Ambivert**. This is a personality that is somewhere between an introvert and extrovert. Most people show traits and qualities of both personality types. See the article on pages 1-2 to learn about this topic.

▶▶ *Marc Freedman*, MBA, Founder/CEO of **Encore.org** spoke on helping clients navigate the new stage after mid-life.

Encore.org is a great website for the next stage to start something

different.

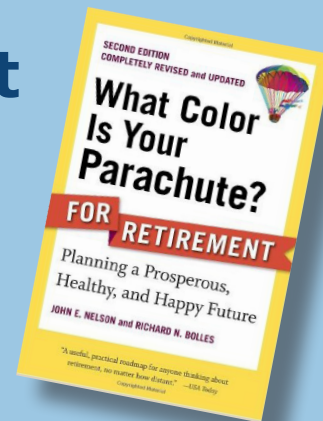
He also recommends a book by *Richard N. Bolles*:

**What**

**Color is**

**Your Parachute? for**

**Retirement.** This is a great book that gives you a step by step guide to planning your retirement life.





FINANCIAL PLANNING, INC.

425 Commercial Street | Suite 203  
Mount Vernon, WA 98273  
(360) 336-6527

650 Mullis Street | Suite 101  
PO Box 1610  
Friday Harbor, WA 98250  
(360) 378-3022

[soundfinancialplanning.net](http://soundfinancialplanning.net)



**William "Bill"  
Morrissey, CFP®**

**Tamera "Tammy" L.  
Prouty, CFP®**



**Over 30 Years of Financial  
Planning and Investment  
Advisory Service**

Join our  
**EMAIL LIST**

to receive firm news and  
weekly economic updates

Contact us at  
[info@soundfinancialplanning.net](mailto:info@soundfinancialplanning.net) to join!

**CONNECT WITH US**



*Harmonizing your money with your life.*

Sound Financial Planning, Inc. only transacts business in states where it is properly registered or notice filed, or excluded or exempted from registration requirements. Follow-up and individualized responses that involve either the effecting or attempting to effect transactions in securities or the rendering of personalized investment advice for compensation, as the case may be, will not be made absent compliance with state investment adviser and investment adviser representative registration requirements, or an applicable exemption or exclusion. This information should not be construed as investment advice. All information is believed to be from reliable sources; however, we make no representation as to its completeness or accuracy.