

# Integrated Living

## Integrated England

May 13, 2019

**Have you decided what your Outlook is for 2019... yet?** Previously, I encouraged you to “take action in 2019 by reviewing your calendar and rebalancing the allocation of your time to the priorities which will lead toward your successful outcome in 2019”.

Earlier this year, my wife and I took out our calendar and knew we wanted to prioritize time for a visit with our daughter in England. My son-in-law is attending the University of Cambridge’s Judge Business School (MBA) and my daughter is teaching English to Chinese students.

Before I proceed, I want to thank everyone who provided well wishes for our journey. Once again, the individuals and families I choose to serve are of the greatest encouragement and inspiration to me!

I’ve been to England several times, including being in meetings the early afternoon of 9/11/2001. Our country and England have shared history; after all, some have said that the U.S. was the first BREXIT! The memories of the people with whom I engaged in 2001 provide comforting reflections and a warmth which is not typical.



JOHN SLEETING, PARTNER

John W. Sleet, Partner at Clearwater Capital Partners. As a Certified Estate and Trust Specialist™ (CES™) with over twenty-eight years of finance and capital markets

What struck me this time was the beauty as seen through my wife's eyes. To slow down and take in the architecture, artwork, museums, food, and even a spot of tea. To walk the streets of London and hidden pathways of Cambridge – both holding wonderful surprises around each corner.

Although Game of Thrones might be a hit television show today, the gruesome dark reality which existed on Tower Hill London definitely didn't have us thinking of the 'good ole days'. Quite the contrary, the history is amazing, but challenging. Yet, over the years there have been many splendors created for our enjoyment today.

So the question is, what are we doing each day to make the world a better place and move it from our version of mid-evil times and toward a world we want to pass on to future generations. So I ask again, what is your Outlook?

 John Sleeting

# An Integrated Outlook

January 25, 2019

**What is your Outlook for 2019?** Although the future is unknowable, President Abraham Lincoln once said, "The best way to predict your future is to create it." So I ask, what are you creating in 2019?

Our firm recently completed our Outlook 2019 (if you'd like a copy, please email me). The integrated process is an annual ritual which begins in the fourth quarter and is a discipline which can be applied to one's life:

- Reading a wide array of perspectives with differing world views,
- Performing due diligence analysis to fact check and cross reference understanding,
- Forming a hypothesis of potential scenarios,
- Debating with trusted peers to obtain candid feedback,
- Assessing various possible outcomes,
- Outlining steps to be taken if/when information reveals a particular pattern is emerging.

experience, John is uniquely positioned to serve a select group of successful high-net-worth individuals and families with respect to dynastic estate planning strategies, retirement income planning, investment management, life insurance structuring and charitable giving.



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The process to integrate information results in a thesis framework which does not predict the future, but provides a blueprint in order to create the future.

Therefore, as we start 2019 with our families, friends, and neighbors, what future do we want to create - relationally, physically, or professionally?

I encourage you to take action in 2019 by reviewing your calendar and re-balancing the allocation of your time to the priorities which will lead toward your successful outcome in 2019. Perhaps that means reducing time to good things which have become routine and re-allocating time to new endeavors which are life giving to you. Integrate your planning process to create the Outlook for 2019 you desire.

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 John Sleeting

# Integrated Giving

December 21, 2018

**Integrated Giving**... no, it's not typo, I mean 'Giving' ... What did you GIVE your best to in 2018? Did you GIVE your best to your family and friends? Did you give your best to your employer? Your community? All of the above or something else?

I'm talking integration here ... if you didn't give your best to your priorities, why not?

Okay, you can't give your best to everything ... therefore, instead the question for those topics that are low on the priority list is, why you did them at all?

Why do something half-way? Aren't those obligations diluting your best self? Should you look to remove the obligatory tasks, work, meetings, and trips so that you can focus on your life's priorities?

Then, as you focus on the priorities, whomever / whatever they may be, don't they deserve your best self?

And, as year end approaches and you consider year end charitable giving, don't give out of compulsion or obligation, but give your best joyfully. Give financial gifts to the priorities in your life ... I know, sounds straight forward, but how often are financial gifts given without deep introspection.

To further the integration, consider giving together as a family.

My encouragement for year end giving (or any time of year), is to integrate giving with your relationships ... this is something we're doing:

- Offer to give to a charity an amount on behalf of family members,
- The amount is not important, but the process can be enriching,
- Ask children / grand-children / siblings to let you know: the charity name to which they'd like to give, the website (so you can research with them, especially for younger participants), and most importantly, WHY that specific organization is important to them? (look for an opportunity for deeper discussion).

As a couple, we engaged our adult children and their spouses with an amount and asked the very questions above. Although we're still waiting on their specific responses; interestingly, their initial reaction was excitement to do this together as a family. Additionally, although they all give to charitable organizations on their own, there is a renewed sense of responsibility in 'this gift'. They are making decisions to allocate resources from mom & dad's pool of funds instead of their own ... a heightened sense of stewardship has been tapped, very rewarding to us as parents!!

I encourage you to do the same ... it doesn't have to be a big formal process, just do it – integrate your giving this year end with others, that are a priority in your life, and give together!!

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 John Sleeting

# The Integrated Life

December 01, 2018

## **Integrated Living**

About

**Integrated Living...** WOW, no pressure there!! Life can be overwhelming. Trying to balance our families, work, friends, finances, spiritual, physical, charitable, and recreational lives (to name a few) can be mind-boggling. Therefore in an attempt to try and balance life, we instead become compartmentalized... but this is not living a whole life, it is fractured and segregated.

Ever feel this way? I did, I was commuting to downtown Chicago for work, my family in the suburbs, kid's school functions, missing school activities because of work (and significant travel), not engaging in church or with friends like I should or wanted to... feeling like I was letting everyone down. The Second Law of Thermodynamics had kicked in - the increasing tendency toward disorder, but it was in my life.

I needed a process of bringing my life together in an orderly manner which was sustainable over time, not a destination. Was I learning, applying, and living the best version of who I was created to be?

I've learned that integrated living is really an iterative process; pausing to gain clarity on what is important and clarity regarding my priorities. Pausing to reflect on the blessings of life versus simply striving for the next thing. Pausing to work out physically. Pausing to take in life & consider my legacy. Having the conviction to say 'no' and the commitment to say 'yes'.

I have the extreme good fortune of having been blessed in so many ways, which I don't take for granted. One of those blessings is that I have never felt as much of an integrated life as I do right now. I need to continue the process of saying 'no' to many good things, so that I can focus on integrating the 'best'!

I have the honor to serve fantastic individuals and families with respect to their wealth management processes. I am frequently inspired by and encouraged from the very people I serve (funny how life works).

**IntegratedLiving.Blog** is my sharing of these learnings and inspirations (without breaking confidentiality) ... it is my own discipline to pause and remind myself that being made whole allows me to give my best to the world around me.

I grew up in the Northwest Suburbs of Chicago, married my high school sweetheart (and after 28 years of marriage, I am still the luckiest guy in the world!), and raised three wonderful adult children who inspire me daily. After moving around the country, working for very large corporations and spending time in over 25 countries, it strikes me that life is good, sweet, hard, sad, fulfilling and fragile wherever you find yourself. I work with an outstanding group of people who are focused daily on serving our clients to the best of our abilities... we love what we do and hope it makes the world a better place!

Why the picture? Paint colors individually, or even alongside one-another, are uninspiring. It is when an artist begins to blend the different colors together

that form takes shape. **We are given many roles and titles, the question is how we will integrate the color palette to paint the picture we call life. And, when our life on this planet is complete, will others reflect on our artwork, known as legacy, and be inspired?**

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 John Sleetig

# Family Office Boards

November 29, 2018

As outlined in our 2017 'Intro to Family Offices', we highlighted the intentionality of structure which families bring to develop their Capital. In particular we shared that a family's wealth, and thereby risk management, should be viewed across a wide array of Capital considerations and approached with respective intentionality: Human Capital, Intellectual Capital, Social Capital, and Financial Capital.

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 John Sleetig



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