



JANICZEK®
WEALTH MANAGEMENT



Recommended Books, Apps & Resources

A 2015 listing of favorite books, apps and resources from the private library of Janiczek founder, Joseph J. Janiczek.



Recommended Books, Apps & Resources: 2015



Our founder and CEO, Joseph J. Janiczek, has built an extensive private library of books and learning resources on many different topics over the last three decades and counting. As technology has evolved, he expanded his library and interest to include hardware, software and multi-media solutions. We briefly visited with him to share some of his new and old favorites. Here are his answers to our questions:



What smartphone and tablet do you personally use today?

Joseph: I just upgraded to the *iPhone 6 plus*, the larger of the two new iPhones from Apple and love it. Several friends and clients have mentioned that they fear it is too big to handle, but I think the pros outweigh the cons by a long shot. I do have the 128 gigabyte version because I pretty much tapped out the 64GB I had with my prior smartphone. Earlier in the year I did upgrade to the iPad Air 2. Between my iPhone and iPad I find I never use my now old laptop and I use my desktop computers less and less.



Are there any new Apps you've come across that you recommend?

Joseph: I've stayed with several of my old favorites, which keep getting better and I found some new apps I like. My team turned me on to *Basecamp*, a collaborative project management application, and I love it for larger projects that involve several team members and outside vendors/consultants. I found AP News too biased and completely changed to *BBC News*, which gives me a nice worldwide news perspective. My *SleepIQ App* from Sleep Number is cool; it monitors my sleeping time, my heart rate, my breathing rate and the quality of my sleep automatically each night. It has a great dashboard that allows me to look at one night, a week or months of sleep patterns - an important new part of my health regimen. I also like *Bloomberg*, *Uber*, *AccuWeather* and *Flixster*.

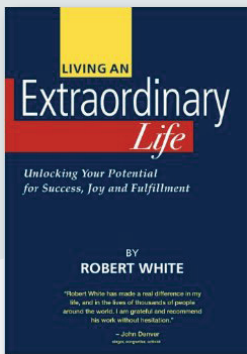


303-721-7000



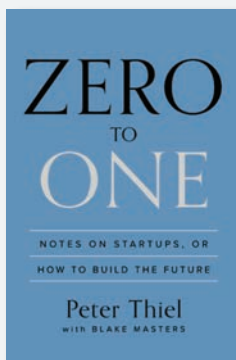
What are some of your favorite infographics from 2014?

Joseph: *Creative Routines*, which can be found at www.infowetrust.com illustrates how Benjamin Franklin, a personal favorite of mine, and many other famous creative geniuses, spent their day and night. Others on the infographic include Mozart, Beethoven, Freud, Dickens, Tchaikovsky and Darwin. *The Depth of the Problem*, available at <http://apps.washingtonpost.com/g/page/world/the-depth-of-the-problem/931/> is an excellent example of how this form of communication can aid a reader in understanding a topic better than just words or statistics. Finally, *Your Brain on Beer vs. Coffee* at en.ilovecoffee.jp/posts/view/79 is a fun infographic that makes the case for kickstarting your brain with different drinks to get different creative or execution results. Being very visual, I find well developed infographics to be fascinating.



You are celebrating your 25-Year Anniversary as a company. Who are some of the thinkers and coaches who helped you grow the most during this quarter century?

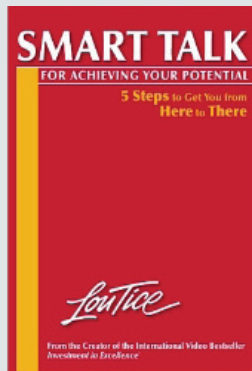
Joseph: Early on, I went to Aspen to participate in an intense experiential learning program put on by my friend Robert White, who founded Arc International and published *One World, One People* and *Living an Extraordinary Life*. I also attended Business & You, an intense 3-day program put on by my good friend David Neenan in Ft. Collins, Colorado. For a dozen years, I participated in Strategic Coach with Dan Sullivan and loved every moment of the experience. More recently, the Stagen Integral Leadership Program and Thought Patterns for High Performance by the Pacific Institute are among my favorites.



What new book has inspired you the most this year?

Joseph: *Zero to One* by Peter Thiel and Blake Masters explains the difference between scaling and optimizing something that already exists (1 to n) versus genuinely creating something new (0 to 1). It was written by a legendary entrepreneur and venture capitalist and does a great job of challenging the status quo on creativity. It starts by teaching how to ask questions that can lead anyone in finding value in unexpected places. I actually have the audio version since I now find I comprehend better and apply what I learn quicker when I hear audio books versus read books.

Recommended Books, Apps & Resources: 2015



What resources go along with your 25-Year Anniversary theme “Tradition & Integrity Meet Curiosity & Innovation”?

Joseph: Do a search in Google on “quotes about curiosity” to really see why I have anchored into this word. In short, the virtue of curiosity is critical to being a lifelong learner and it is the secret ingredient of the most intelligent and creative people I have ever met. I simply want to encourage curiosity as a virtue in every stage of life and at every level of wealth—it’s the oxygen that keeps progress going. The book *Smart Talk for Achieving Your Potential*, by Lou Tice, is the closest book content to the Thought Patterns for High Performance workshop series we are putting on for our clients in 2015 as a part of our anniversary celebration. This book explains how to use your brain/mind to build a bigger, better and brighter future.



Tell us why you are putting on the Thought Patterns for High Performance workshop for clients in 2015?

Joseph: I’m genuinely full of gratitude for all of those who helped us get to where we are today, so I wanted to gift a unique experience that has the potential for profoundly impacting lives. As I view how we are helping people master money (via the disciplines of Evidence Based Investing and Strength Based Wealth Management) I wanted to augment what we normally and mainly do with something different, but complimentary. Since I often encounter clients who are battling a blind spot, comfort zone or some other restrictive mindset that is holding them back, the Thought Patterns for High Performance workshop - developed by international experts on how the mind works - was an easy pick. We have one workshop a month scheduled from January to July and expect to have clients come in from 25 states across the country.

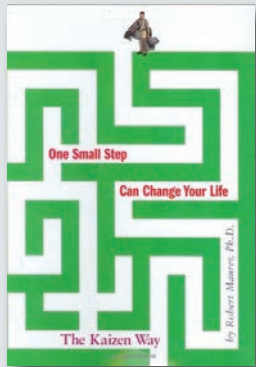


On a totally different topic, any new health/exercise resource you find useful?

Joseph: In past years, I’ve recommended *P90X*, *Insanity* and *Dr. Gundry’s Diet Evolution*. I continue to like these resources and have seen them transform bodies and lives. This year my wife bought us the *T25* exercise program to add to the above collection. We do it together and we both like it very much... and it is only a 25-minute workout requiring little to no equipment. In short, I find the video workouts to be the easiest to master as a routine.

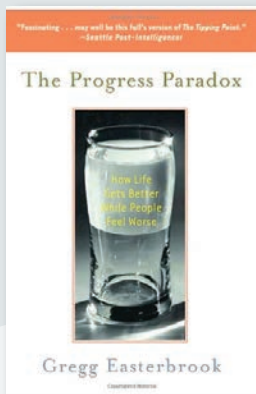


303-721-7000



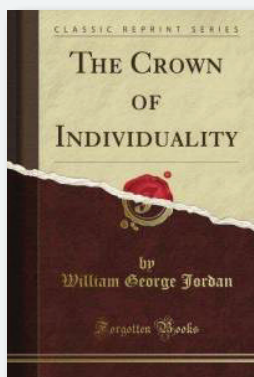
If someone is stuck, not acting on goals or projects as much as they would like, what book should they read?

Joseph: Years ago, I met Robert Maurer, Ph.D., the author of *The Kaizen Way* at Canyon Ranch health spa in Tucson, Arizona. His book is about unleashing the potent force of kaizen, the Japanese technique of achieving great and lasting success through small, steady steps. I've seen this same approach in many leadership and personal growth programs over the years by different names. Simply put, when we make a project too big, we get overwhelmed and don't know what to do. Or, sometimes we think too much about something when acting gives us the feedback we need to tell us if we are even on the right track. This method helps avoid both of these common problems.



You've stated that you have observed many people experience "the Progress Paradox" after experiencing a life-changing liquidity event. Any good book on this topic?

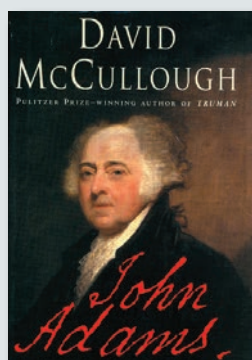
Joseph: Yes, the book is from 2003 but certainly still very relevant. It is called *The Progress Paradox*, by Gregg Easterbrook. In short, the author makes a compelling case for changing the way you think about the world...and our collective ability to make it better. He hits upon some psychological reasons of why people who experience success suddenly begin thinking it will all get bad from here. I personally see this attitude surface from time-to-time, impacting investment decisions and life decisions in less than useful ways. I think it is a good problem to confront so that one can make better decisions.



What are some of your favorite books from the 19th Century or earlier?

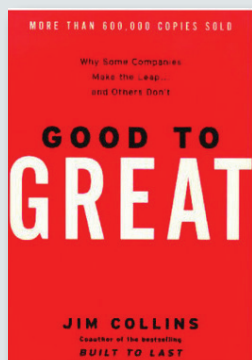
Joseph: Most of my books are from the 20th Century on, but I happen to love anything written by William George Jordan who authored books in the latter 1800's to early 1900. *The Kingship of Self-Control*, *The Majesty of Calmness*, *The Power of Truth*, *The Crown of Individuality* all have powerful messages about personal responsibility that ring true to me. *Summa Theologia* (written in the 13th Century) is St. Thomas Aquinas' comprehensive look into the origin, operation and purpose of life and the universe, and a favorite of mine in the realm of spirituality and philosophy.

Recommended Books, Apps & Resources: 2015



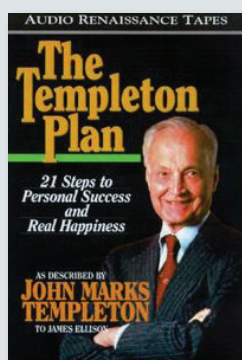
What are some of your favorite history books?

Joseph: David McCullough's *John Adams* book is superb and in my view a must read to understand just what our founding fathers (and mothers) went through to form our great nation. My wife Mary and I had lunch with David and his wife Rosalee and he shared his method of writing Pulitzer Prize-winning books, which includes Rosalee reading a draft out loud to him so he can hear what he wrote and edit it from that perspective. *Guns, Germs, And Steel* by Jared Diamond is interesting and so is *How We Got Here* by Andy Kessler. *A Man Called Intrepid* and *Agent Zigzag* are two of my favorites about World War II espionage.



What are some of your favorite business oriented books?

Joseph: *Good to Great* by Jim Collins is a favorite. *Topgrading* by Bradford D. Smart is superb on how to hire, coach and keep the best people on your team. *Blue Ocean Strategy* by W. Chan Kim and Renee Mauborgne is fantastic. *Creative Destruction* by Richard Foster and Sarah Kaplan is interesting. *The New Economics* and *Out of Crisis* by W. Edwards Deming have provided great guidance to me on systemizing success. *Upside* by Adrian J. Slywotzky explains a method of turning competitive threats into breakthroughs. Charles Koch wrote *The Science of Success* and after meeting him and seeing how he runs organizations I am fascinated by his approach. *Barbarians to Bureaucrats* is an interesting look at leadership styles with an historical look back into the rise and fall of Rome. Finally, *Conscious Business* by Fred Kofman, from whom I had the great honor of taking a six-month course on "Leading Learning Communities," is excellent. (Get the audio book version)



What are some of your favorite financial/investing books?

Joseph: I think between *John Templeton*, *John Bogle*, *Warren Buffet*, *Benjamin Graham* and *Charlie Munger* there is a wealth of superb wisdom and guidance. *The Templeton Plan* is a simple, little-known classic in my mind. *On Success* and *Poor Charlie's Almanac* by Charlie Munger provide superb guidance. *What Your Money Means* by Frank Hanna is lesser known, but brilliant.

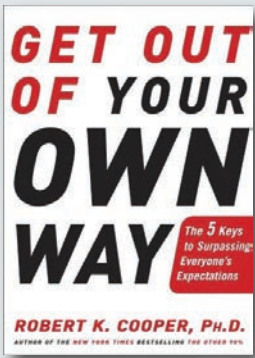


303-721-7000



Who are some of the top business and executive coaches you recommend?

Joseph: *The Strategic Coach* has some excellent coaching programs. Dan Sullivan and I go back 12-years. Gazzelles and Verne Harnish's *Rockefeller Habits* has some excellent business coaching. *Action Coach* is pretty interesting, and our former Vice President of Innovation team member *Paul Winkler* now coaches this material. Executive Coach *Teri Schwartz* has excellent training on running effective collaborative meetings. (Full disclosure: Teri is also a client of Janiczek)



What are some great books in the realm of personal growth and self-development?

Joseph: *Get Out of Your Own Way* by Robert Cooper is excellent. *Mastery* by George Leonard is a great short read on the path of mastering anything. *Brain Rules* by John Medina provides twelve principles for surviving and thriving at work, home, and school. *A Whole New Mind* by Daniel Pink explains new success skills for the future. *The Happiness Advantage* by Shawn Achor is an interesting twist on happiness. *Healing the Culture* by Robert J. Spitzer, S.J., Ph.D. explains the four levels of happiness. My work with him on the board of the Spitzer Center for Ethical Leadership has demonstrated to me how relevant this topic is in business, personal life and spiritual growth. *Crazy Busy* and other books by Edward (Ned) Hallowell take a great look at how to achieve focus in spite of all the interruptions we experience in the modern world. *Mans Search for Meaning* by Victor Frankl is a classic. *Linked* by Albert-Laszic Barabasi helps in understanding how we are all connected. Finally, I own a complete library of every book ever written by Buckminster Fuller. I do not agree with some of Bucky's comments about religion and I know he was not that good with money. However, he was an absolute genius in understanding and explaining how many things in the world work, and his work in the area of integrity is inspiring.



What are some of your favorite books to keep a healthy attitude about problems and opportunities in the world?

Joseph: *Abundance* by Peter Diamandis helps one keep an eye on the exponential growth occurring and a healthy look at the huge opportunities and threats such innovation is likely to have on our world (Note: See Mr. Janiczek's private filmed interview of Mr. Diamandis before you read this book.) *The Progress Paradox* explains how people who experience progress and success get into thinking things are going to get worse. *Hard America Soft America* explains how cultures impact work habits and success into adulthood. *The Ultimate Resource 2* by Julian Simon makes a strong case for how human welfare has been improving and will continue to do so indefinitely into the future. *The Rational Optimist* explains how prosperity evolves. The classic *What to Say When You Talk To Yourself* by Shad Helmstetter, PhD also helps to maintain and build a healthy attitude.

Recommended Books, Apps & Resources: 2015



Finally, you have a process called **iMethod™** you use to learn from people who are already doing something extremely well. How does this process work?

As much as I like and use books, videos, and coaching experiences to learn and grow, I have to admit that I have always made the best progress when I found a person getting a result I wanted and then interview that person in detail to really understand what they are doing. I have literally used this technique over and over since I was a teenager.

I call it the **iMethod, for Imitate, Integrate and Innovate**. In short, you identify a person who excels at a high level at what you want to achieve and then ask them to give you advice. Most are humbled and will agree to meet. You interview them in detail about what they are doing and why. I even ask them questions about the “inner game,” i.e. how they are thinking. I also ask for examples and any ancillary resources they use (books, systems, coaches). I then set the goal to imitate them as well as I can. As I **imitate**, I **integrate** the learning into my own life or situation to make it my own. Then, as I embody what I learned and live it, I begin to **innovate**, making improvements upon what was learned from the source.

“I believe I do much better for the time being by first copying some good things than by working without that foundation.”

Vincent Van Gogh

This method is not new or unique. As I study various accomplished people I often find that they used a similar approach. For instance, I recently went to a Van Gogh exhibit on the work of this great artist. Right at the beginning of the exhibit I saw a section called “Learning by Copying.” Then a quote from Van Gogh who said: “I believe I do much better for the time being by first copying some good things than by working without that foundation.” The display went on to essentially show Van Gogh first **imitating**, then **integrating**, and finally **innovating** from the foundation of excellent work by other artists of his time. So, if I had just one resource to share with our clients and friends, it would be the **iMethod**.

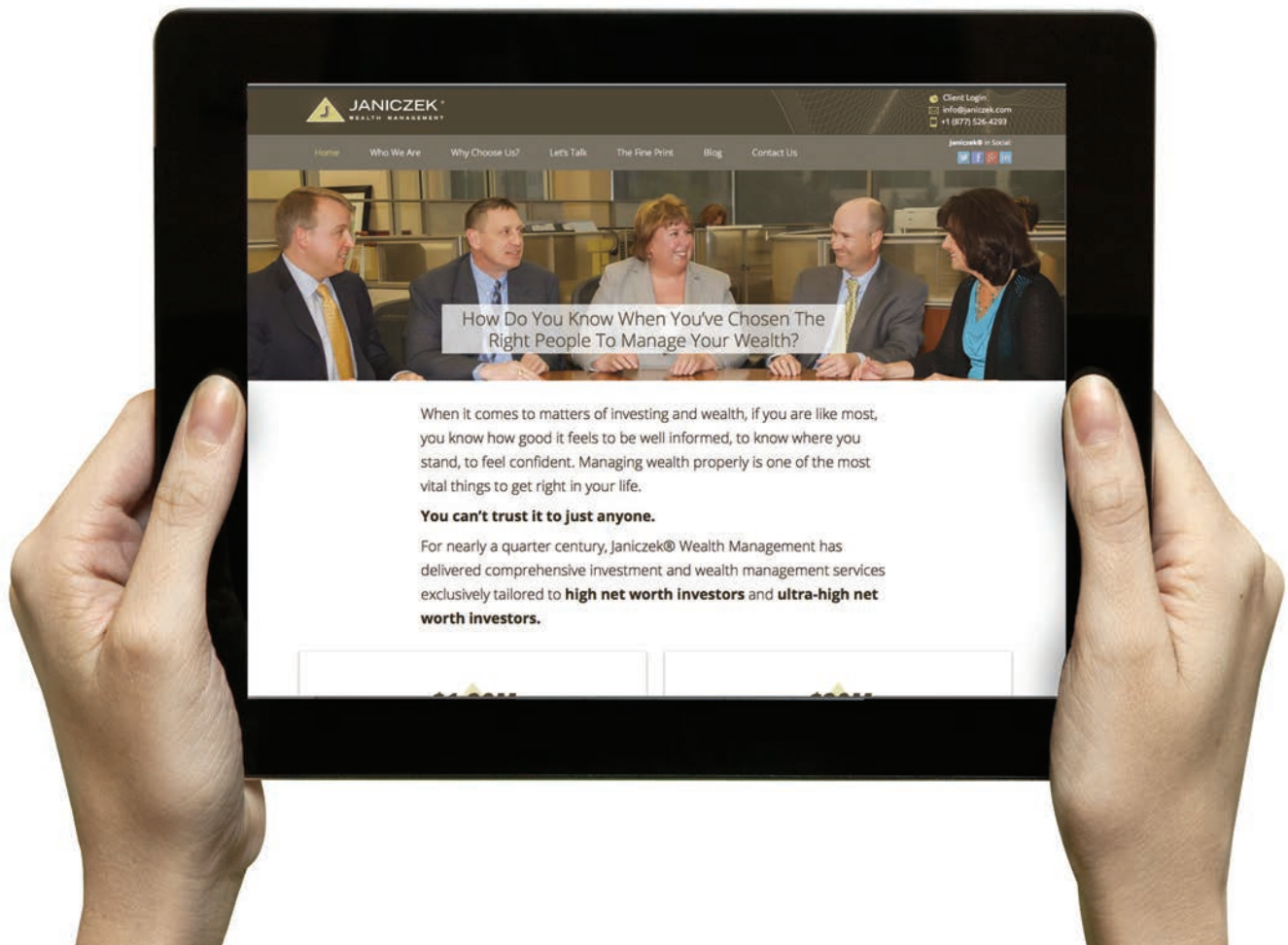
This concludes the interview and 2015 list of recommended Books, Apps & Resources. If we can assist you further with any of these resources, please call us at 303-721-7000.



303-721-7000

HAVE YOU VISITED OUR NEW WEBSITE?

Not only does it tell our story and explain our approach... it shares our latest thoughts via our Blog. Simply go to www.janiczek.com to check it out.



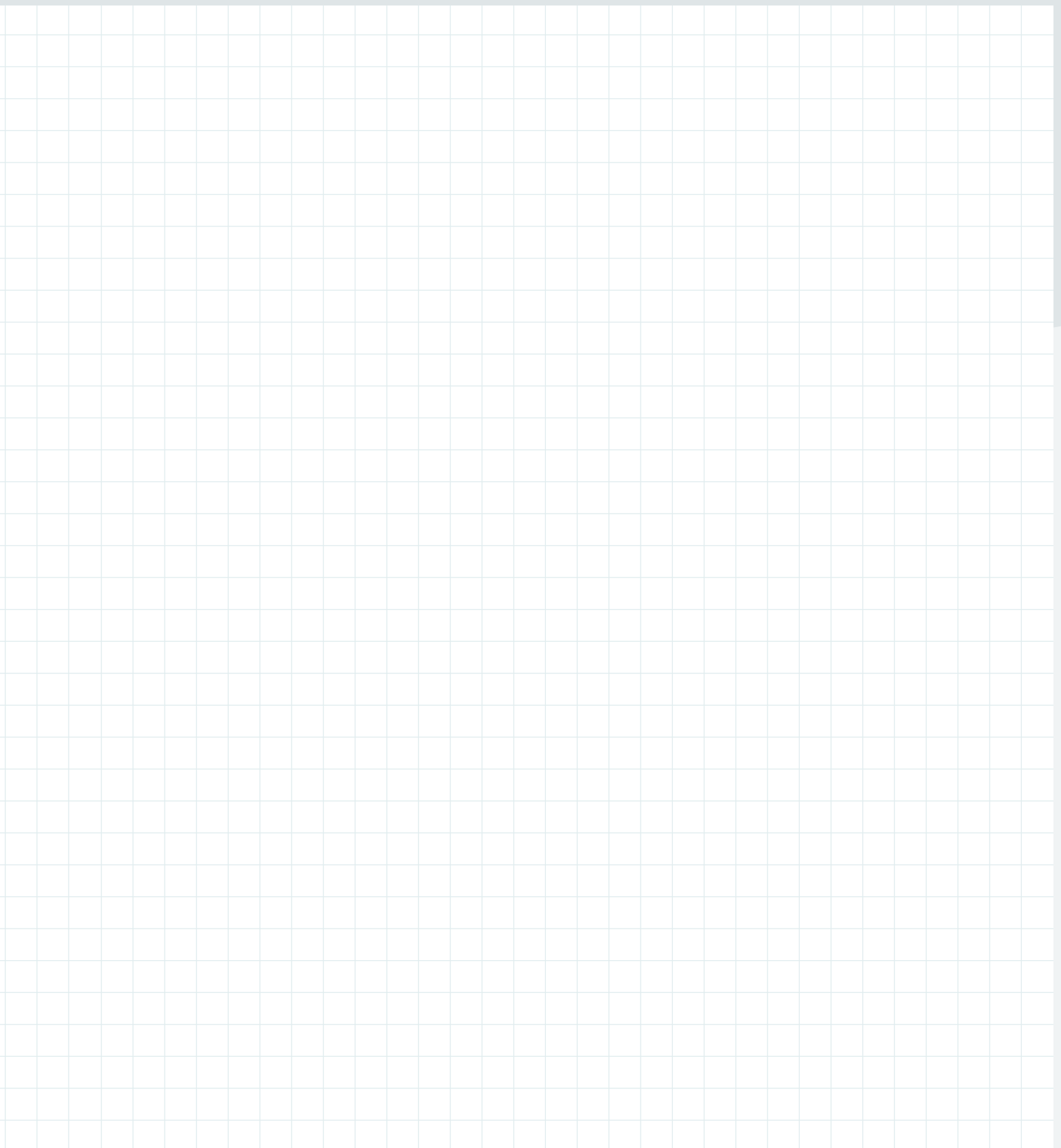
Notes

A large grid of graph paper for taking notes. The grid is composed of light gray lines forming a uniform pattern of squares. It occupies the majority of the page area below the title.



303-721-7000

Name: _____ Date: _____





JANICZEK®
WEALTH MANAGEMENT

Janiczek & Company, Ltd.
8400 E. Crescent Parkway, Suite 160
Greenwood Village CO 80111
303-721-7000
Toll Free: 877-526-4293
Fax: 303-721-7082
www.janiczek.com

About Janiczek & Company, Ltd.

For nearly a quarter century, Janiczek & Company, Ltd. has delivered comprehensive investment and wealth management services that are tailored to the needs of high net worth investors (individuals with portfolios of \$1 to \$20 million) and ultra-high net worth investors (individuals with portfolios of \$20 million+). The firm specializes in serving accomplished business owners and C-level executives, with a particular specialty in assisting those experiencing a life-changing liquidity event. Named among the top, best and most exclusive wealth advisors in the country multiple times, the company has been a pioneer in Evidence Based Investing and Strength Based Wealth Management™. Serving clients across the country on a fee-only, fiduciary basis, we welcome opportunities to serve like-minded clients within our exclusive niche. For more information go to www.janiczek.com or call us at 303-721-7000.

This brochure provides some details on the design, aim and objectives of The Janiczek Wealth Optimization Process™ and the services of Janiczek & Company, Ltd. Results will vary, and no assurances can be made as to the degree of progress made toward the aims and objectives identified herein. Janiczek & Company, Ltd. is a registered investment advisor with the Securities and Exchange Commission. See the Janiczek & Company, Ltd. ADV Part II Disclosure Document provided to all prospective clients prior to engaging our services and available to all clients thereafter on an ongoing basis upon request. Please remember to contact Janiczek & Company, Ltd. if there are any changes to your personal/financial situation or investment objectives for the purposes of reviewing/evaluating/revising our previous recommendations and/or services, or if you want to impose, add, or modify any reasonable restrictions to our investment advisory services. Ratings by third party rating services, such as Worth Magazine, Crescendo Business Services, Mutual Funds Magazine, should not be construed by a client or prospective client as a guarantee that any client or prospective client will experience a certain level of results if Janiczek & Company, Ltd. is engaged, or continues to be engaged, to provide wealth and investment advisory services, nor should they be construed as a current or past endorsement of Janiczek & Company, Ltd. by any of its clients. Worth Magazine and Mutual Funds Magazine base their selections on information submitted by investment advisors throughout the country. Crescendo Business Services surveyed 74,000 high-net-worth investors in the Denver Colorado area (one of our markets and the location of our headquarters) in nine client satisfaction categories. Schwab Institutional, Ned Davis Research, Tamarac and Morningstar are unaffiliated vendors utilized in the process of delivering some of the services provided to clients and including their names herein should not be construed as an endorsement of any kind. The term "relationship" is not used to describe a formal business ownership arrangement but rather as a way to describe the relationship we have and continue to build with these organizations in an attempt to better serve our clientele. TM & Copyright 2015, Janiczek & Company, Ltd. All rights reserved. The Janiczek Wealth Optimization Process™ is a trademark of Wealth with Ease, LLC which also has a patent pending on various proprietary elements of the Wealth with Ease® System.