

Setting boundaries and avoiding burnout

You *can* and *should* develop deep relationships with your Clients. However, if you don't create healthy boundaries, you can easily find yourself losing focus. You run the risk of getting off track with your goals and experiencing an imbalance in both your work and personal life. By establishing, communicating and enforcing your boundaries with Clients, you can create a business you're truly proud of, while maintaining your personal integrity. We developed this worksheet in collaboration with Katie Turner, MSc, Registered Psychologist.



We help. You grow.



5 types of healthy boundaries and how to maintain them



Time boundaries

Your time is valuable and it's important to protect how you use it. Setting time boundaries means understanding your priorities and setting aside enough time for the many areas of your life without overcommitting. List your priorities as a guide. When you understand your priorities, it's much easier to limit the amount of time you are giving to other people.

Consider the following:

- How much time do you spend with Clients?
- Do they call or text you at 10 p.m. on a Saturday?
- Do your meetings often go over time, causing you to be late or unprepared for the next Client?



Communication boundaries

Let others know how you prefer to communicate. Prioritize the values that are important to you and use communication boundaries as a way to protect your values. You can provide top-notch customer service and still have communication boundaries that protect your values.

Consider the following:

- Is there a topic you're not comfortable discussing with Clients?
- Do you have Clients that demand a lot of time above and beyond your typical meetings?
- Do you and Clients communicate with respect for one another?



Responsibility boundaries

As an advisor, your job is to help ensure Clients are on the right path to reaching their goals. How much responsibility you reasonably take for Clients' successes or failures is a fine line to walk. If you take on too little responsibility, you come off as uncaring or disconnected. If you take on too much, this can lead to an unhealthy co-dependent relationship and interfere with your personal life or relationships with other Clients.

Consider the following:

- How much responsibility do you take on for Clients' successes and failures?
- Do you take on the burden of Clients' feelings?
- Do you allow Clients' problems to keep you up at night?

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Relationship boundaries

As an advisor, you get to know Clients and their families well. So much so that you may start to think of them as more than just Clients. However, when Clients cross the line and become friends, it introduces a whole host of potential problems that can negatively affect your business.

Consider the following:

- Do you discuss and set boundaries for both your working relationships and personal relationships?
- How often do you attend social events with Clients?
- Do you allow Clients to follow your personal social media accounts?



Personal boundaries

Setting personal boundaries is just as important as setting work boundaries. These are the boundaries you define based on your own unique needs.

Consider the following:

- How often do you say “no” to commitments?
- Do you keep a regular sleep schedule?
- Do you limit your exposure to negative news (e.g. on TV, in newspapers or on social media)?

Setting boundaries is necessary for your mental health. It's a critical component of self-care and takes time and practice. Use the chart below to explore healthy boundaries you can put in place today.

Remember to:

1. Set clear expectations by respectfully communicating your boundaries.
2. Develop a support system of people who respect your right to boundaries.
3. Revisit your boundaries often.

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| Time | Example: I will not answer emails after 6 p.m. |
| Communication | Example: If a conversation becomes uncomfortable for me, I will stop the conversation and let the Client know. |
| Responsibility | Example: I will not allow a Client's feelings to dictate how I feel. |
| Relationship | Example: I will discuss boundaries and expectations ahead of time, with friends who are interested in becoming Clients. |
| Personal | Example: I will not engage with people who are hurtful. |

Source: True measure advisors, How to Adopt Healthy Boundaries with Your Financial Planning Clients

