

The Time I Canceled Everything for a Duck Race

by Hannah Moore | Dec 22, 2023



People ask me all the time how I do it all. It's a legitimate question. There are a lot of irons in the fire.

In the last four years, I went from having a small RIA to launching Amplified Planning, where my husband, Charlie, and I run The Externship, a virtual summer training program for future and new financial planners. We also run AP CORE, a monthly professional development program. I recently expanded my practice to encompass an innovative teaching-hospital-style residency program for financial planners. I speak at conferences, led an FPA task force, and am assisting with a university research project studying financial planners' access to parental leave.

Oh, and during this time, I had three babies.

It's been a full four years. My team is bigger than ever, and with so many people depending on me – clients, customers, and employees – the stakes are higher. The pressure doesn't let up, and I often feel like I'm being pulled in different directions.

Some days when people ask me how I do it all, I think *It's easy!* I've built the right team around me. Other days, the question reminds me of everything I'm *not* doing and all the balls I've dropped.



As with many other professionals, especially working parents, my priorities often overlap, and I find myself constantly, fluidly negotiating my way through them. **I want to tell you about a time when I didn't do it all, when I dropped the ball, when it wasn't easy, and what I learned from that experience.**

As part of this attempt at work/life balance, Charlie and I decided that we and our kids would spend a month away after the 2023 Externship ended. We rented a lakehouse near my parents' home and made the journey by minivan from Dallas to South Dakota. It was supposed to be a working vacation where we'd work about 20 hours a week and spend the rest of the time with family.

Whether or not a working vacation was a successful endeavor is still up for debate. We enjoyed seeing extended family and escaping the Texas heat. But we didn't have our usual structures: childcare, routines, and an office. The blurred lines between work and home were nothing short of...difficult.

It all came to a head one afternoon. I had a regularly scheduled call with our 2023 Externs. Everything was set until I realized the call fell during the same time as The Duck Race. What is The Duck Race, you ask? It's an actual duck race – like ducks, on a little track, racing, while South Dakotans cheer them on at the county fair. Also known as the event my children were looking forward to more than any other.

I'd promised them we'd go, and I'd also scheduled the Extern call. In short, I made a big mistake. I couldn't bounce between the two or easily reschedule one. My two commitments crashed into each other. I had to make a choice.

I chose the Duck Race.

When I messaged my team, they were...not thrilled.

We're canceling an alumni call for a duck race?

At a county fair?

In South Dakota?

My marketing director immediately began writing a *truthful-ish* email about a mysterious "scheduling conflict." I said no – I wanted to be honest and tell 800 people the real reason our meeting was postponed.

Externship Alumni Webinar 8/17: Cancellation 🦆



Hey there Extern Alumni,

The bad news: There was a scheduling mixup and today's Externship webinar is canceled.

The funny news: The scheduling mixup involves a duck race at the county fair that I promised my kids we'd attend.

The good news: We look forward to seeing you next week when we meet with Schwab's Leslie Tabor and several of your fellow Extern alumni.

Thanks for understanding!

Hannah

Within minutes, we were flooded with responses. Here are just a few:

Kids always come first in my book. I'm celebrating you today, Hannah!

Have fun at the fair!

No worries. Enjoy the moment with the kids. We fully understand; you made the right call!

Have a great day!

Hannah,

Hats off to you for making a clear statement of commitment to kids as the priority.

Thank you for everything you do in advancing the community.

Hope to meet you in person in one of my future visits to Dallas.

Six months later, I still hear from Externs who tell me that the Duck Race was a game changer for them. Even though I'd messed up, I'd unintentionally taught our Externship alumni several important lessons and learned a few, myself. Here's what I learned:

First, I should have had better boundaries from the start.

It's difficult to put into words just how big of a lift it is to pull off The Externship every summer. Charlie and I often work late into the evenings, and summer 2023 was no different. Once it was over, our whole family needed a break. A real break. Not a hybrid half vacation, half working vacation with no childcare or normal routines. (How did I not think this was a recipe for disaster?)

I've heard it said that you *can* have it all, but you *cannot* have it all at the same time. Boundaries don't just mean picking this or that. They also mean keeping processes in place to manage your time, resisting the pull to over commit, and balancing seasons of work with dedicated time to unplug.

Next summer will be different. If you want to schedule a meeting during the week or two after the conclusion of the 2024 Externship, well, you won't be able to. I'll be with my family.

Second, the bridge of trust you build with your people is invaluable.

As a business owner and financial planner, I think a lot about the trust my clients have put in me. I think about the career changers and new planners in Amplified Planning. People put their money, their plans, and their careers in my hands.

There are many reasons that this "bridge of trust" is crucial. In fact, I could write a dozen articles on this subject alone. But for right now, I want to focus in on this: You are going to mess up.

You are human.

You are not perfect.

No matter how hard you try, it is going to happen.

And when you do, it will be that long relationship where you've proven yourself reliable 99 times out of 100 that will help salvage your error.



It is critical that you build a bridge of trust with the people depending upon you, be they clients or team members...or Externship alumni. When you inevitably mess up, it is that strong relationship and long-built history that will help you recover.

Third, it's okay to prioritize your family.

You are allowed to be a financial planner and a mother, a father, a sibling, a spouse, a friend. I know this profession you've chosen is a hard one. The early years are pure hustle. I know you're working long hours, building a name for yourself, and gaining skills you never thought you'd need. Keep working, keep getting better.

But sometimes, choose the duck race.

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