

# **Case Study**

## **The Client**

**Peter C. married his childhood sweetheart; they had three children. His real estate and investment company had holdings in five states. Peter had several partners in this venture. Pete struggled with alcohol and drugs from his teenage years to the age of 34 when he entered a 28-day residential treatment program.**

## **The Need**

**Pete came to me directly from the treatment center. His relationships were a complete mess. Most of his family members did not want him in their lives. His business partners and associates wanted to distance themselves as fast and as far as possible.**

**Pete's health was in jeopardy and his finances were in very bad shape. The business had a huge negative cash flow. Pete needed a mentor to work with him through his recovery process. He also needed someone to resolve all of his business problems.**

## **The Solution**

**We worked together for over a year, primarily on his recovery, because without that, everything else would cease to matter. We used a proven systematic method that created a foundation from which we then could address his life issues. I use my own brand of 'recovery' and 'releasing' methodologies that respect and honor each person's individuality. This recovery process included addressing all of the family's concerns.**

**Next, I did an in-depth analysis of Pete's businesses including the business model, the financial details, the culture, and the partners' wants and needs. A unique aspect my company brings is to ensure everyone in the mix is satisfied with the result. The solutions included getting everything Pete wanted and satisfying the partners individual wants and needs.**

## **The Result**

**Pete's business problems were resolved by implementing a complex plan that included doing sixty-one 1031 real estate exchanges. The net**

result for my client was a 200% positive change in the business's cash flow. In addition, Pete became the sole owner of strong real estate and business assets in his geographic area. Because of this project, Pete no longer had partners and he had an easy portfolio to manage.

After working with me for fourteen months, Pete appeared to have recovered from his alcohol and drug problems. His family was reunited. He healed his broken relationship with his sister. His children were safe with him. In addition, his brother started doing business with him again, something he had said he would never do.

### **Post Script**

*Not all happy endings last. I will probably never know the exact details, but my client stopped doing the things necessary to maintain and grow in his sobriety. He had returned to using alcohol and drugs. He died out of the country of some unexplained medical problem. He was 38 years old when he died.*

*Healthy long lasting recovery requires vigilance against returning to old habits in how we think and what we do. Just as someone with a life threatening disease requires a different lifestyle, so does the addicted person.*



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