

TRIBE TALKS

- Succession Planning (last week)
- Buying a Book of Business (last week)
- Managing Projects & Teams (June 24)
- Telling your Story (June 24)

WHAT'S COMING UP

- 06.21 Lifestyle Office Hours
- 06.28 Lifestyle Coaching Call
- 06.28 Launch Office Hours
- 07.12 July Productivity Retreat (virtual)
- 07.15 Build-a-Brand Boot Camp
- 07.16 Client/Advice Model Workshop

- 09.23-25 Park City Retreat [be ready for a different experience)

LIMITLESS
The Good Vibes Tribe

FOR TODAY'S
QUESTIONS
[slido.com](https://www.slido.com), [#lifestyle](https://twitter.com/lifestyle)

LIMITLESS

Limitless Coaching Call

JUNE 14, 2021

Maintaining Momentum



STEPHANIE
BOGAN



GABE
NELSON



SIDNEY
DIVINE



DON
HILARIO

MAINTAINING MOMENTUM

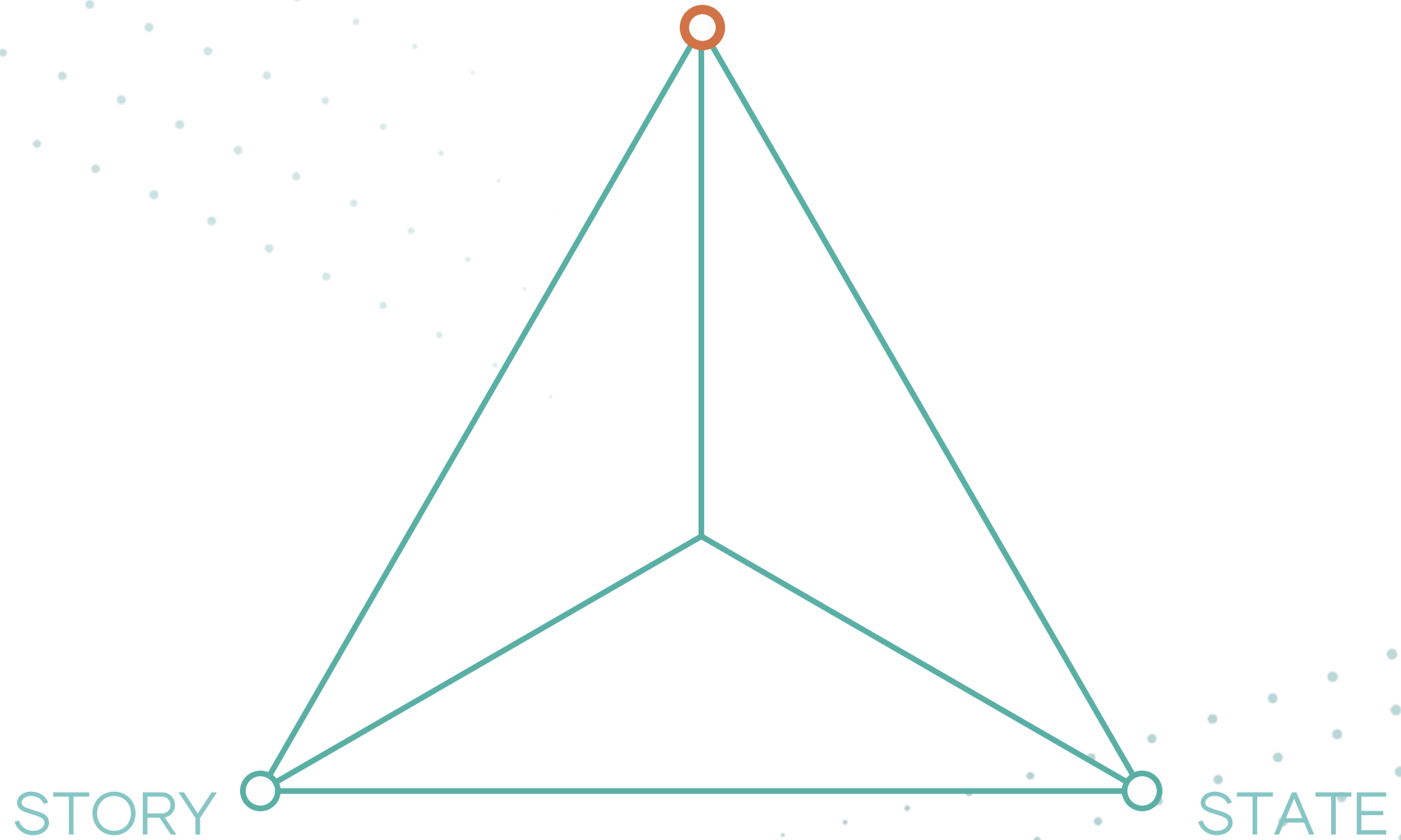
1

PURPOSE+ PROGRESS
= MOMENTUM

2

INSPIRED ACTION
VS. EFFORTED ACTION

STRATEGY



STORY

STATE

HIGH PERFORMANCE HAPPINESS
SUCCESS MODEL

YOUR COACHING PATH

MY ACCOUNTABILITY PLAN:

Make Results Not Excuses

Your 2021 support system and what you can expect from your Limitless Coaching Team.

MONTH	PLAN OF ATTACK	THE PLAY BY PLAY
January	Introduction to Accountability & Engagement	Are you ready to launch? Create your Launch Plan to stay clear and committed.
February	Accountability Coaching Call 30-minute call with Accountability Coach	Are you clear, focused and ready to work? Review Launch Plan with Accountability Coach.
March & April	Mastermind Pod Check In with Advisor Coaches	How is your Mastermind going? Maintaining momentum is paramount to your success.
May	Post Retreat Survey & Mid Year Engagement Survey	How are YOU doing? How are WE doing? How can we make the MOST of the second half of the year?
June	Accountability Coaching Call 30-minute call with Accountability Coach	Review accomplishments and key objectives to date. Create an action plan for second half of year.
July & August	Mastermind Pod Check-Ins & Success Coaching with Stephanie	Are you seriously stepping up your success? A personal pod check-in with your Chief Possibility Officer.
September	In person connection at Retreat & Post Retreat Survey	Are you progressing as planned? How are you going to finish up this year?
October & November	Accountability Coaching Call 30-minute call with Accountability Coach	Are you progressing as planned? How did you move the needle this year. Get clear on wins and decide on primary objectives for 2022.
December	Office Hours Mixer	Enjoy a holiday happy hour with your Good Vibes Tribe to share your wins and what's next.

2021 Limitless Coaching Path

Plan your Limitless projects by selecting at least one area of focus per quarter. For projects that are take longer than a quarter, check as many quarters as required for project completion.



	Year 1				Year 2				Year 3			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
CLARITY & ACCOUNTABILITY												
Science of Success												
My Model Practice												
Power of Productivity												
Your Vision of Success, Action & Accountability												
COMMUNICATING YOUR VALUE												
Nailing Your Niche												
Telling Your Story												
Finding Your Fee Model												
DELIVERING MASSIVE VALUE												
Prospect Process												
One-Page Plan, Amazing First Meeting												
Goals-Based Client Review												
5-Star Service System												
Client Meeting Surges												
Model Meetings												

2021 Limitless Coaching Path

Plan your Limitless projects by selecting at least one area of focus per quarter. For projects that are take longer than a quarter, check as many quarters as required for project completion.

	Year 1				Year 2				Year 3			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
CLARITY & ACCOUNTABILITY												
Science of Success												
My Model Practice	✓											
Power of Productivity		✓										
Your Vision of Success, Action & Accountability	✓	✓	✓									
COMMUNICATING YOUR VALUE												
Nailing Your Niche	✓	✓	✓									
Telling Your Story												
Finding Your Fee Model												
DELIVERING MASSIVE VALUE												
Prospect Process	✓	✓	✓									
One-Page Plan, Amazing First Meeting												
Goals-Based Client Review												
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2021 Limitless Coaching Path

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	Year 1				Year 2				Year 3			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
CLARITY & ACCOUNTABILITY												
Science of Success												
My Model Practice	✓	✓	✓									
Power of Productivity	✓	✓	✓									
Your Vision of Success, Action & Accountability	✓	✓	✓									
COMMUNICATING YOUR VALUE												
Nailing Your Niche	✓	✓	✓									
Telling Your Story	✓	✓	✓									
Finding Your Fee Model	✓											
DELIVERING MASSIVE VALUE												
Prospect Process												
One-Page Plan, Amazing First Meeting	✓	✓	✓									
Goals-Based Client Review	✓	✓	✓									
5-Star Service System	✓	✓	✓									
Client Meeting Surges	✓	✓	✓									
Model Meetings												

THE PRACTICE BENCHMARK ANALYSIS: INPUTS & HISTORICALS



- Instructions:**
- In the cells to the right, select the current year and the quarter end data. Note: results will not be accurate if this information is not correct.
 - Gather data from the Firm Data Inputs column for the prior three years and for each quarter of the current year. Note: Current year data is YTD inputs for each quarter.
 - For each year input your data into the light blue cells with grey text. Dark blue and white cells will automatically calculate.
 - Review year-over-year changes to evaluate historical trends.

Firm Data Inputs	2018	2019	YOY % Δ	2020	YOY % Δ
Headcount					
Partner Professionals*	1	1	0%	1	0%
Professionals*			*		*
Staff Members	0	1	*	2	100%
Revenue					
Total (Gross) Revenue	\$594,000	\$630,000	6%	\$627,000	0%
Investment Management (AUM)	\$576,000	\$610,000	6%	\$602,000	-1%
Investment Advisory (AUA) Fees			*		*
Financial Planning Fees (hourly or retainer)	\$750	\$2,527	237%	\$11,200	343%
Securities Trails & Commissions			*		*
Insurance Trails & Commissions	\$12,000	\$17,000	42%	\$13,000	-24%
Other			*		*
COGS (Cost of Goods Sold, aka B/D fees, etc.)			*		*
Expenses					

THE PRACTICE BENCHMARK ANALYSIS: BENCHMARKS & GOALS

- Instructions:**
- Input current and 3-year goals into the cells highlighted light blue, all other goals will calculate based on your inputs.
 - Use the dropdown to select your benchmark for comparison.
 - Review your % to Goal and % to Benchmark to evaluate your progress.

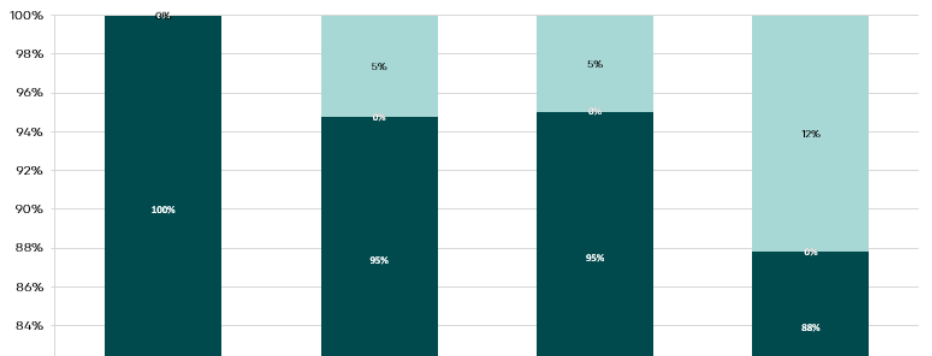
Business Performance Key Performance Indicator (KPI)	2018	2019	2020	2021 Annualized	2021 Goals	% to Current Year Goal	3 YEAR GOAL	BENCHMARK	% to Benchmark
Net Revenue (Total Revenue - COGS)	\$229,000	\$305,000	\$408,000	\$419,000		-		n/a	-
Total Revenue	\$229,000	\$305,000	\$408,000	\$419,000	\$0	-	\$0	\$364,588	115%
Revenue bps on Assets (AUM)	1.27%	1.22%	1.24%	1.27%		-		0.93%	137%
Revenue per Client	\$4,378	\$5,545	\$7,034	\$6,869		-		\$3,616	190%
Revenue per Professional	\$229,000	\$305,000	\$408,000	\$419,000		-		\$299,068	140%
Revenue per Total Headcount	\$229,000	\$305,000	\$408,000	\$419,000		-		\$139,742	300%
Expense KPIs (Median)									
Direct Expense per Client	\$870	\$636	\$690	\$2,459		-		\$934	263%
Indirect Expense per Client	\$0	\$0	\$0	\$0		-		\$1,128	0%
Expense per Professional	\$124,000	\$138,000	\$143,000	\$150,000		-		n/a	-
Expense per Total Headcount	\$124,000	\$138,000	\$143,000	\$150,000		-		n/a	-
Profit KPIs (Median)									
Operating Profit per Client	\$2,283	\$3,036	\$4,569	\$4,410		-		\$977	451%
Operating Profit per Professional	\$105,000	\$167,000	\$265,000	\$269,000		-		n/a	-
Operating Profit per Total Headcount	\$105,000	\$167,000	\$265,000	\$269,000		-		n/a	-
Clients KPIs (Median)									
Total Clients	46	55	58	61		-		94.00	65%
Clients per Professional	46	55	58	61		-		65.00	94%
Clients per Total Headcount	46	55	58	61		-		47.00	130%
Fee-based Clients	46	0	58	61		-		n/a	-
Fee-based Clients per Professional	46	0	58	61		-		n/a	-
Fee-based Clients per Total Headcount	46	0	58	61		-		n/a	-
Asset KPIs (Median)									
Assets Under Management (AUM)	\$18,000,000	\$25,000,000	\$33,000,000	\$540,984		-		\$40,950,000	81%
AUM per Client	\$391,304	\$454,545	\$568,966	\$540,984		-		\$389,699	139%
AUM per Professional	\$18,000,000	\$25,000,000	\$33,000,000	\$540,984		-		\$27,014,425	122%
AUM per Total Headcount	\$18,000,000	\$25,000,000	\$33,000,000	\$540,984		-		\$20,000,000	165%
	120	60	30			-		n/a	-
	\$272	\$255	\$228	\$0		-	\$0	n/a	-



THE PRACTICE BENCHMARK ANALYSIS: REVENUE ANALYSIS

- Instructions:**
- Review the pre-populated data below to see how your revenue is trending over time.

Metric	2018	2019	YOY % Δ	2020	YOY % Δ	2021 Annualized	YOY % Δ
Investment Management (AUM) Fees	\$ 229,000	\$ 289,000	26%	\$ 387,750	34%	\$ 184,000	-53%
Investment Advisory (AUA) Fees	\$ -	\$ -	*	\$ -	*	\$ -	*
Financial Planning Fees (hourly or retainer)	\$ -	\$ 16,000	*	\$ 20,250	27%	\$ 25,500	26%
Securities Trails & Commissions	\$ -	\$ -	*	\$ -	*	\$ -	*
Insurance Trails & Commissions	\$ -	\$ -	*	\$ -	*	\$ -	*
Other	\$ -	\$ -	*	\$ -	*	\$ -	*
Total (Gross) Revenue	\$ 229,000	\$ 305,000	0%	\$ 408,000	34%	\$ 209,500	-49%



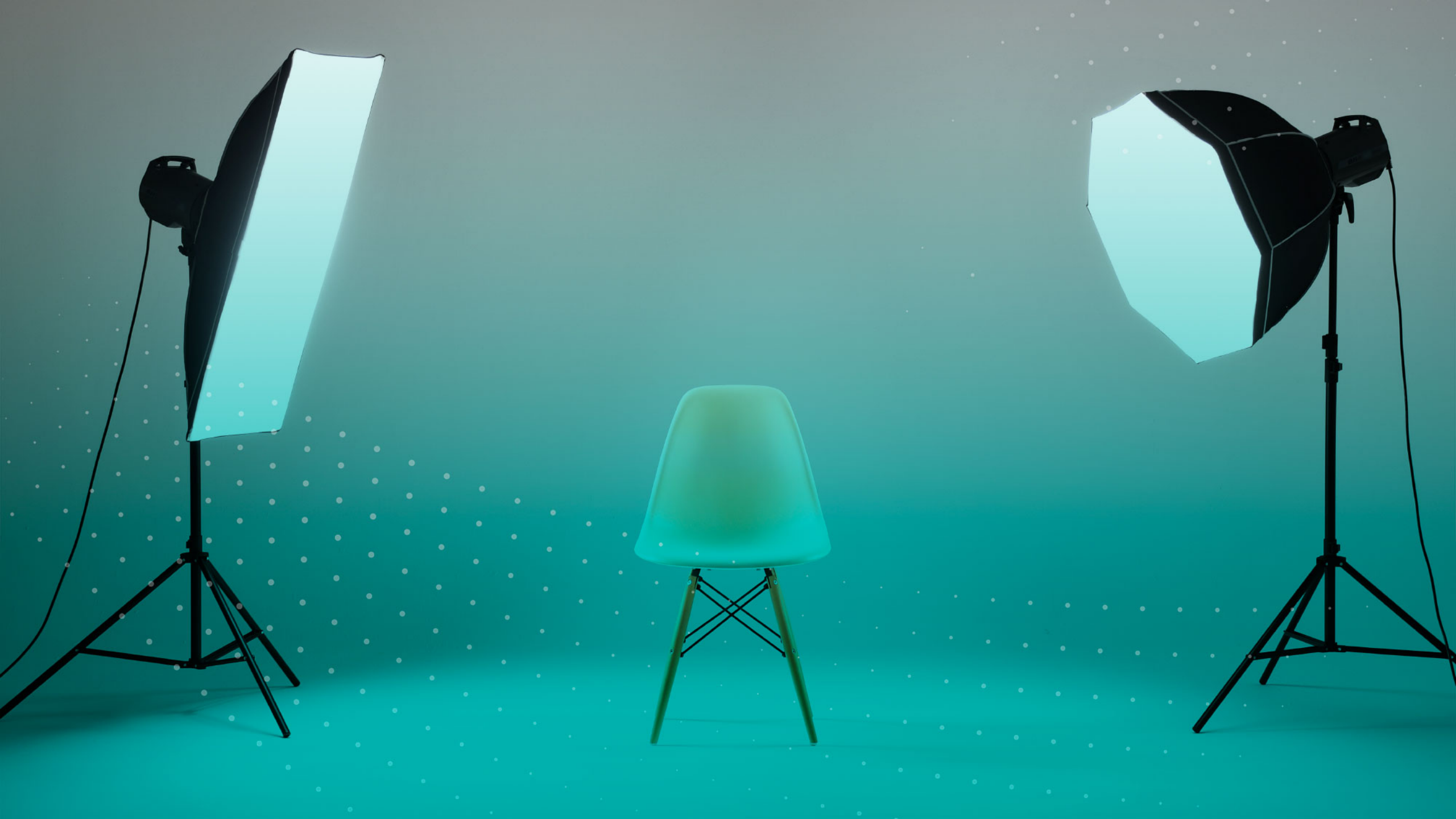
THE PRACTICE BENCHMARK ANALYSIS: ECONOMIC MODEL

- Instructions:**
- Review the pre-populated data below to see how your firm financials are trending over time.

Year	Total Revenue	Direct Expenses Professional Comp	Indirect Expenses Staffing Comp	Indirect Expenses Overhead	Operating Profit
2018	\$ 229,000	\$ 40,000	\$ -	\$ -	\$ 189,000
2019	\$ 305,000	\$ 35,000	\$ -	\$ -	\$ 270,000
2020	\$ 408,000	\$ 40,000	\$ -	\$ -	\$ 368,000
2021 Annualized	\$ 419,000	\$ 37,500	\$ -	\$ -	\$ 381,500



YOU CAN'T
MANAGE
WHAT YOU
DON'T
MEASURE





LIMITLESS Q&A