

WELCOME

AUGUST COACHING CALL



UPCOMING COACHING

- 08.16 Lifestyle Office Hours
- 08.23 Lifestyle Coaching Call
- 08.23 Launch Office Hours



GROWTH RETREAT

- 09.22 Build-a-Brand Bootcamp
- 09.23-24 Limitless Growth Retreat

Want to connect? Visit the Growth Retreat room on Tribe!

ARE YOU ACTIVELY
EXPLORING
SELLING YOUR FIRM?

If so, email Coaching Inbox
coaching@limitlessfa.life

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

LIMITLESS

LIMITLESS COACHING CALL

August 09, 2021

Powering Up Your Productivity



DOES IT WORK? DOES IT FEEL



COURSE OUTLINE

HOME

ACCOUNT ▾

CALENDAR

COACHING CENTER ▾

LEARNING PATHS

LEARNING CENTER ▾

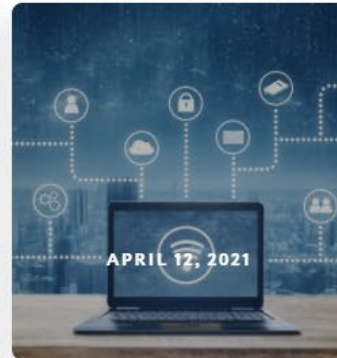
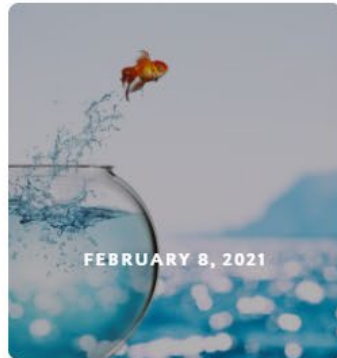
RESOURCES ▾

RETREATS

LOGOUT



Coaching Calls [CALLS →](#)



 UPCOMING CALL [CALENDAR →](#)

AUG 10:00 am – 11:30 am PDT ↻
9 Coaching Call

[View Calendar](#)

 PERSONAL LEARNING PATH



75-Minute Meeting



Amazing First Meeting



Breakout: Perfecting Podcasting



Client Meeting Surges



2021 Program Calendar

 V-Retreat: Clarity & Accountability

JANUARY 11, 2021

WHAT'S YOUR BIGGEST
MINDSET SHIFT
THIS YEAR?

WHAT'S YOUR BIGGEST
LIFESTYLE WIN
THIS YEAR?

WHAT'S YOUR BIGGEST
FINANCIAL \$ WIN
THIS YEAR?

When telling your story comes back.



Daniel Suiter 2 weeks ago
Aspiring Limitless Advisor

One of my "little old ladies" emailed me this today. Made my Monday and wanted to share with the tribe.

Hey Dan,

I just wanted to write and say "thank you" for the July 4th card that you sent. I love the cards and notes that I get from time to time that let me know that you're out there. The best part of my relationship with you and Elaine is that you're in charge of worrying about my money so I don't have to. The fact that you make me feel good about myself is an added bonus.

Sally

SUCCESS SPRINT CHECK IN

Summer Success Sprint



Ann Shubert LIFESTYLE a month ago

Professional and Personal: Really COMMIT to my model schedule as a PRACTICE. means being aware of when it goes wrong, catch myself, understand what I could do differently, and adjust. I have a schedule (mostly), but external pop ups derail me (more than my own distractions). I am going to start scheduling "catch up" blocks in my calendar where I can get back to things so I have somewhere to put the pop-ups, rather than just letting them slip away. I'll see if that helps. If not, I'll try something else.

30 Day Sprint



Dan Darchuck LAUNCH a month ago

Family Man, CEO, Advisor, Author, MTB riding & Skiing Fool

Not sure whether I'm setting this up correctly, but in answer to Stephanie's challenge, I will make at least 3 prospecting calls per day Mon-Thu. As I hit the target each week, I'll reward myself by taking Friday off. Will someone please let my assistant, and my wife know that this is OK? 😊

I need more RPA-time



Michael Hansen LIFESTYLE 2 months ago

Fiduciary Global Financial Planner

I will schedule time with my assistant to offload even more tasks to her.

Summer Sprint - Prospecting and Workouts



Ben Simerly LAUNCH a month ago

Here to spend more time with people! Instead of, you know, other "stuff."

For the next 5 weeks (through end of July), Mon-Thurs

Week 1 Update: Completed the goals! Though, not always in an ideal way... There were a couple of nights where I was working out or doing my revenue-producing activities in the evening due to dentists and client appointments, but I didn't let them slide or make an excuse for skipping them.

Business: Starting my day with revenue-producing activities at 8 am each day I am at the office until at least 9 am instead of "fitting-in" revenue-producing activities if there is time at the end of the day.

Personal: Leaving the office to hit the gym every day I am at the office from noon to 1, no matter what I do or do not accomplish while I am there. Putting down work to get to the gym seems to be the real issue. 9 times out of ten when I don't do this, it's because of items WITHIN my control. And the mid-day time is key. It makes such a difference in my day to exercise mid-day.

Niche & Story



Dan Costigan LAUNCH 2 days ago
Financial Advisor

I'm making progress on who I want to serve and the story I want to tell, but I need to be more accountable with a clear plan.

I will have my niche and story for you all on August 31st. Stay tuned!



Liked by ^

July/August Accountability



Clinton Miller LIFESTYLE 9 days ago

Professional: Study CFP material every single day.
Personal: Get to bed by 10pm



sit in the
STEP-UP
SEAT

