

LIMITLESS Coaching Call Transcript

DECEMBER 13TH, 2021
DECEMBER COACHING CALL

45

00:16:28.440 --> 00:16:36.810

Stephanie Bogan: Alright, so this is our December coaching call and what we always like to do at the end of the year is really take stock of and reflect on.

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00:16:37.290 --> 00:16:46.020

Stephanie Bogan: Where we are, but in particular how far we've come one of the greatest things about this program is that it is wingtip to wingtip and it is deep.

47

00:16:46.500 --> 00:16:54.990

Stephanie Bogan: Right there's a lot here, and the challenge with this program is that there's a lot here and i'll talk to you a little bit about some of the things we're working on next year to help with that.

48

00:16:55.590 --> 00:17:03.240

Stephanie Bogan: But when we think about everything that's possible it's really about how do we create the clarity about what we want to do create the focus.

49

00:17:03.630 --> 00:17:16.740

Stephanie Bogan: of how we're going to apply our time and energy, and then, how do we make sure that we really get to work, doing those things, and so, as we reflect on the year end that that feeling of what's the word i'm looking for.

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00:17:17.850 --> 00:17:30.960

Stephanie Bogan: lack deficiency should have could have everyone else did, but I didn't if anyone has any of those thoughts feelings or experiences I want you to know that you're just utterly human.

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00:17:31.830 --> 00:17:40.290

Stephanie Bogan: Right I look back at the end of each year and i'm like Oh, we did this, but our brains love to by a factor of nine to one focus on the negative to the positive.



52

00:17:40.950 --> 00:17:55.620

Stephanie Bogan: So we know from our engagement with you, we certainly know from your feedback in the survey scores that you've gotten a ton of value out of the program, but I also know that we all have those voices in our head, so what I like to have you do at this point is just take one very deep breath.

53

00:17:58.710 --> 00:18:05.340

Stephanie Bogan: And I want you to think about the biggest change and i'm gonna ask you to share this in the chat later, but I want to give you some time to reflect on it.

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00:18:05.760 --> 00:18:12.450

Stephanie Bogan: what's the biggest change that you have experienced in your time here work wise or personally.

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00:18:13.380 --> 00:18:21.450

Stephanie Bogan: that you will carry with you and how I want you to just think about this, how can you use that to serve your goals and success in the future.

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00:18:21.780 --> 00:18:26.370

Stephanie Bogan: Because the great thing about what you learn here and I hope that you're all really aware of this is that.

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00:18:26.820 --> 00:18:35.250

Stephanie Bogan: It does not go away, it will serve you into perpetuity the the conversations and the thoughts behind the what's in the whys and the House and your service model.

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00:18:35.460 --> 00:18:45.600

Stephanie Bogan: will change over the years, but the the understanding of what they can do, and why they can do it and how they can do it and what's the experience and the behavior that goes into it you'll have that forever.

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00:18:45.990 --> 00:18:51.420

Stephanie Bogan: So your job is to really take stock of and reflect on all that you've learned this year.

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00:18:51.960 --> 00:18:57.300



Stephanie Bogan: And the way that I like to do that I didn't officially build it into the PowerPoint but allison will grab the link for you.

61

00:18:57.810 --> 00:19:07.440

Stephanie Bogan: Is I wrote an article last year, based on some coaching work that I had done and been doing with clients, called the Thank you letter and anybody here doing the Thank you letter last year listed the Thank you letter Scott.

62

00:19:08.010 --> 00:19:16.830

Stephanie Bogan: The Thank you letter is a really powerful exercise that I now do with the end of each year and Alice will post, the link to that article in the chat I don't think it's I don't know if it's in the library.

63

00:19:17.370 --> 00:19:28.110

Stephanie Bogan: But a thank you letter is really just because we sit in that place of having that case of this malls the I you know, even when we hit our goals it's I could have this I should have that, if only this.

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00:19:28.410 --> 00:19:35.190

Stephanie Bogan: And that doesn't serve us and it costs us a lot, so the Thank you letter is your way to create what we call in coaching completion like.

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00:19:35.490 --> 00:19:41.070

Stephanie Bogan: How do I process everything that happened in this case the challenging things and how do I use them.

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00:19:41.520 --> 00:19:50.820

Stephanie Bogan: To edify me add to me grow me and help me use it in a positive way going forward because I genuinely believe that we don't fail, we win.

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00:19:51.150 --> 00:19:58.560

Stephanie Bogan: For we learn, but we can only learn if we put ourselves in that place of awareness and so the Thank you letter is you literally write out.

68

00:19:59.430 --> 00:20:06.960

Stephanie Bogan: Every not fun thing that happened this year right personal conflicts business conflicts relationships.



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00:20:07.320 --> 00:20:14.490

Stephanie Bogan: Right my service model broke I didn't get to that website like whatever it is that really created pain and pressure intention for you.

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00:20:14.940 --> 00:20:27.810

Stephanie Bogan: And then your job is essentially to thank to be thankful for it to thank it like what did I learn from this experience how did it serve me because our biggest blessings almost always come wrapped in sandpaper.

71

00:20:28.380 --> 00:20:32.490

Stephanie Bogan: We just have to be in a place in a space where we can catch them.

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00:20:33.210 --> 00:20:36.660

Stephanie Bogan: And we're usually so busy rubbing our elbows on the side of the wall is trying to keep up.

73

00:20:36.930 --> 00:20:50.580

Stephanie Bogan: That we don't take that time to reflect and so we're going to have some of the Members from this year share their highlights from the year, but I want to make sure that it's a process that we all go through together, so my invitation to you all, is to write a thank you letter to.

74

00:20:52.200 --> 00:20:57.210

Stephanie Bogan: For all of the great things that it gave you, but also for all of the challenges, because.

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00:20:57.990 --> 00:21:09.150

Stephanie Bogan: Growth is messy and that's what you came here to do change is not your brains favorite thing, some of you really dove in some of you've had to really work to kind of keep your your headspace and yourself focused and on track.

76

00:21:09.600 --> 00:21:20.280

Stephanie Bogan: But at the end of the day, it's about how you take what you learn and how you apply it, and you have the power to do that, so I want you to just reflect on your biggest win for the year.

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00:21:22.080 --> 00:21:27.330

Stephanie Bogan: And I want to have you drop that in the chat like what was your biggest takeaway from this year.

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00:21:30.960 --> 00:21:32.670

Stephanie Bogan: I like that no one is stopping me.

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00:21:34.230 --> 00:21:42.420

Stephanie Bogan: By the transference but yes, no one can really take anything away from you, so if you're ever upset with other people or they're doing this or you're comparing or you're competing.

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00:21:43.020 --> 00:21:52.500

Stephanie Bogan: Just understand that, in reality, no one can really take anything from you, but if you grew up in a survival or a scarcity mentality it's very easy to fall into a frame of mind.

81

00:21:52.950 --> 00:22:00.180

Stephanie Bogan: Where you believe that everything around you is someone taking something from you and that's done a very happy place to live, I spent a few years there I don't recommend.

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00:22:01.230 --> 00:22:09.420

Stephanie Bogan: Highly overrated breathing yes, who said breathing breathing breathing is such a thing like when you take those three deep breaths.

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00:22:10.050 --> 00:22:22.470

Stephanie Bogan: It literally connects your mind and body Harvard mind body institution has done a lot of research around this it grounds, you it calms your brain it brings you back into a place of spaces and turns on your cognitive rational thinking part of your brain.

84

00:22:23.520 --> 00:22:30.600

Stephanie Bogan: And it feels good I actually did some research for some stuff we're doing next year, most of us are actually hyperventilating most of the time, did you guys know that.

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00:22:30.990 --> 00:22:40.680

Stephanie Bogan: Totally blew my mind, so when you think about how you breathe right when we get stressed in particular which the research says we spend 70% of our days there when we get stressed, we



breathe shallow.

86

00:22:41.730 --> 00:22:52.170

Stephanie Bogan: And we really shallow we're not getting to the deeper oxygen and the bottom part of our lungs and it's not as good for our brain and officially if you don't do a certain number of breaths per minute your hyperventilating.

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00:22:52.710 --> 00:23:02.460

Stephanie Bogan: And, on average, we do I don't know, I was like 17 shallow breath were most of us on an average day when we're not aware of and engaged in better breathing habits and patterns.

88

00:23:02.790 --> 00:23:10.680

Stephanie Bogan: Are hyperventilating a lot of the time not obviously, to the point that it's going to kill you, but to the point that your brain is not getting as much work as rich of oxygen.

89

00:23:11.400 --> 00:23:21.690

Stephanie Bogan: And when you take those moments to take those deep breaths Pam right Aaron Ben when you take that time it really does feel better and when we feel better we do better.

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00:23:22.020 --> 00:23:38.910

Stephanie Bogan: So I think that's a great win can't focus and model schedule that's awesome right bringing structured taking agency over our time more clients isn't always the goal Stan that's great I see your coaches on the line tonya Ben Adam tiffany what are your big takeaways this year.

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00:23:40.680 --> 00:23:50.310

Adam Cmejla, CFP®: For me, it was fun finding my lead advisor finding john and having enjoying the team, the amount of agency to use tiffany's word there that has become like ingrained in my mentality here.

92

00:23:51.570 --> 00:24:05.190

Adam Cmejla, CFP®: The amount of agency space not free time but just that it's now allowed me to substitute in to the time I can so I can work on on the business so much more than working in the business I don't know how the hell, I did it before you.

93

00:24:06.480 --> 00:24:07.080



Stephanie Bogan: it's awesome.

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00:24:08.310 --> 00:24:11.130

Stephanie Bogan: So, and just an element of freedom there how about you tanya.

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00:24:12.810 --> 00:24:19.260

Tanya Nichols: massively successful transition to ra this year and I quit coffee which.

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00:24:19.440 --> 00:24:23.250

Tanya Nichols: may seem like not a big thing, but that was a really big deal for me.

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00:24:23.490 --> 00:24:38.880

Tanya Nichols: I was having some stress related health things earlier, and one of the doctors, I talked to she said quit coffee and I did cold Turkey in late August and did a few other things for my health and it's like been a huge improvement.

98

00:24:39.540 --> 00:24:39.930

awesome.

99

00:24:41.190 --> 00:24:43.500

Stephanie Bogan: yeah when we feel better we do better that's for sure.

100

00:24:44.370 --> 00:24:55.860

Stephanie Bogan: yeah we're really good at pumping our adrenal system stress does it coffee does it, and when you do that, like that's good for us to a point right that's part of our survival mechanism, but to do it all day every day.

101

00:24:56.700 --> 00:25:07.740

Stephanie Bogan: You know, you all know, when you start to feel uptight and anxious and wound up all the time because there's never that space that you want to create so it's I think tiny I think it's great that it's about really checking in with yourself and.

102

00:25:08.040 --> 00:25:13.500

Stephanie Bogan: How are you feeling do you have energy are you inspired and engaged during the



day and, if not.

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00:25:14.190 --> 00:25:21.060

Stephanie Bogan: What you know what is the cause of that we talked about a lot of professional stuff here, but to time this point it's really personal Michael and I have been talking like.

104

00:25:21.330 --> 00:25:26.250

Stephanie Bogan: As we age like vitamins and sleep patterns and these things that really do.

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00:25:26.610 --> 00:25:35.340

Stephanie Bogan: affect our performance and our well being particularly right for those of you who are younger great, but as you hit 40s and 50s like you start to notice those things a little bit, and there are.

106

00:25:35.610 --> 00:25:39.360

Stephanie Bogan: ways that we can account for those, so I think it's great and we are actually going to be talking about.

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00:25:39.780 --> 00:25:48.540

Stephanie Bogan: Those things a lot more next year, particularly in the tribe talk series, so that you can kind of go where you want to go and, if you want to go explore breathing or health and fitness or I have a parenting.

108

00:25:48.960 --> 00:26:04.710

Stephanie Bogan: Expert coming in, or a marriage person coming in and you want to talk about systems and tech, then you can go to those two so don't forget that the personal piece is the most important piece protect the asset, and you are always the asset, then how about you, your big wins this year.

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00:26:05.490 --> 00:26:12.390

Ben: I don't know if I can do anything crazy like give up coffee, but you know turning off clients, this summer, when we.

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00:26:12.960 --> 00:26:19.860

Ben: You know, when we hit our goals that we set back in was a 2018 we sort of working together, you know four years later, three years later we hit it.



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00:26:20.430 --> 00:26:28.800

Ben: And so I was able to do crazy things with that new time I said i'd sign up for a stand up comedy class and made my stand up comedy debut earlier this month.

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00:26:29.310 --> 00:26:31.170

Ben: kilda Thank you.

113

00:26:31.560 --> 00:26:32.040

Ben: Thank you.

114

00:26:32.430 --> 00:26:34.470

Ben: ven mo me 100 bucks maybe i'll send you the link.

115

00:26:36.000 --> 00:26:38.910

Ben: Listening but because it was over zoom and.

116

00:26:39.180 --> 00:26:41.580

Adam Cmejla, CFP®: Come on man you don't get out of bed for less than 1000 bucks.

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00:26:41.700 --> 00:26:44.520

Ben: That that the guts a good reminder Ben mommy 1000 and i'll send you a.

118

00:26:46.020 --> 00:26:46.590

Pamela Jacobs: cookie.

119

00:26:48.000 --> 00:26:48.450

Stephanie Bogan: cookie.

120

00:26:50.340 --> 00:27:03.870

Ben: So you know, and if it wasn't, for you know people that you meet in doing coaching programs like these mastermind calls I would have never pushed myself out of my comfort zone to do things like that so so that's a big success for me this year is getting to meet.



121

00:27:04.890 --> 00:27:07.260

Ben: Interesting people that make you that.

122

00:27:09.120 --> 00:27:13.950

Ben: motivate you to be uncomfortable because that's where the real progress breakthroughs happen is in areas of discomfort so.

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00:27:14.520 --> 00:27:20.430

Stephanie Bogan: it's true it's true when we were talking earlier about how growth is messy and I was having a call with one of you this week and I.

124

00:27:20.820 --> 00:27:30.600

Stephanie Bogan: found myself saying something that I say a lot in calls, which is, by definition, when we go to grow to hit that next level when we aspire for some more and better.

125

00:27:31.110 --> 00:27:39.660

Stephanie Bogan: We get really frustrated with the fact that, as soon as we think it's not heat, you know, like Oh, why isn't a year and easy and, yes, we talked a lot about what we do to get on our own way.

126

00:27:39.990 --> 00:27:49.500

Stephanie Bogan: But we also forget that part of that experience is, we have to grow, we haven't operated at that level we haven't thought at that level we haven't.

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00:27:49.770 --> 00:27:57.060

Stephanie Bogan: Seen possibilities that big we haven't done deals that size, we haven't dealt with that tech, but you know, whatever it is.

128

00:27:57.870 --> 00:28:07.710

Stephanie Bogan: Growth is messy is something that you can remind yourself like yes find me an instance in nature, where change and progress.

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00:28:08.130 --> 00:28:13.980



Stephanie Bogan: doesn't come with friction and break down like that's the definition, you have to break down.

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00:28:14.340 --> 00:28:23.370

Stephanie Bogan: To have the breakthrough that doesn't mean massive life breakdown, it might mean Adam going wow you know what I can't charge people this and earn a decent living for my family.

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00:28:23.640 --> 00:28:27.540

Stephanie Bogan: that's the breakdown i'm not willing to accept it anymore, and on the other side of that.

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00:28:28.050 --> 00:28:39.600

Stephanie Bogan: Is the breakthrough, so I think it's just great to see all the coaches having the same experience that you all have the same experience that I am which is we're always learning we're always growing we're always evolving.

133

00:28:40.050 --> 00:28:48.810

Stephanie Bogan: And it's about the coaching the Community the masterminds your peer network, whether it's here or other places the research says that change in progress.

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00:28:49.260 --> 00:28:57.030

Stephanie Bogan: Are the greatest six the highest probability of success that sustainable happens when you have coaching and, in particular when you have that community.

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00:28:57.390 --> 00:29:06.630

Stephanie Bogan: So these are the great stories that we love to hear and the work keeps going so it doesn't mean that everything gets easy and effortless you'll have periods right the coaches are all in.

136

00:29:07.260 --> 00:29:11.550

Stephanie Bogan: spots where they're like yeah this feels great there's no major breakdowns.

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00:29:11.820 --> 00:29:20.760

Stephanie Bogan: And it doesn't mean that when they go to create the more in the better or that six months from now, and idea won't hit or Ben will decide to go do something else and there's time and there's work.



138

00:29:21.240 --> 00:29:32.040

Stephanie Bogan: And there will be breakdowns whatever they are but that's part of our process it's inevitable part of creating a greater level of success for ourselves if we want to be more successful.

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00:29:32.490 --> 00:29:41.700

Stephanie Bogan: Our number one duty is to learn how to be more uncomfortable because the only things that stop us our own company, we find the edge of our comfort zone and.

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00:29:42.060 --> 00:29:48.900

Stephanie Bogan: We pulled back or we play, you know that you all remember double Dutch and my dating myself here again remember double Dutch with the the two groups.

141

00:29:49.290 --> 00:29:56.400

Stephanie Bogan: And if you played or watch people play blake patty double Dutch is like this is the game like i'm in i'm out i'm in i'm out.

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00:29:56.850 --> 00:30:01.080

Stephanie Bogan: And you can look at your business and your life experience and see places that we do that as well.

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00:30:01.620 --> 00:30:11.520

Stephanie Bogan: And then there's pushing I had with absolute conviction and commitment in spite of that discomfort right when Ben had that moment, where he was like if stephanie can work 25 hours a week and run a seven figure business So can I.

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00:30:11.970 --> 00:30:17.730

Stephanie Bogan: or when timing was like I don't want to be in this toxic relationships anymore I just realized that is what's holding me back or when.

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00:30:18.000 --> 00:30:23.220

Stephanie Bogan: Adam decides that history should be more than a shitty car payment better when tiffany's like I have to go to a place.

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00:30:23.580 --> 00:30:30.300

Stephanie Bogan: Where I can spread my wings and do what I need to do to be successful, like those are the breakdowns that feels so tough in the moment.

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00:30:31.170 --> 00:30:39.660

Stephanie Bogan: But if you can remember that growth is messy and that when you're having those moments, they were sitting square smack DAB in the middle of the opportunity.

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00:30:40.140 --> 00:30:51.810

Stephanie Bogan: and our job is to bring that awareness to it, whether it's mindset or methods of Okay, how do I navigate this in a way, where I can embrace the change in the growth that is inevitable and uncomfortable.

149

00:30:52.440 --> 00:31:00.240

Stephanie Bogan: But how can I get out of my own way and get rid of the belief systems and the bullshit and all that other stuff that tends to make it longer and worse and harder than it needs to be.

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00:31:00.780 --> 00:31:06.930

Stephanie Bogan: So hopefully you all have realized that you don't need to be in this business for 15 years grinding it out to build a million dollar practice.

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00:31:08.400 --> 00:31:16.380

Stephanie Bogan: It doesn't mean you're just going to build it in 12 months, you know your strategies that you choose how you commit how you resource them are all levers that you're going to pull.

152

00:31:16.860 --> 00:31:23.910

Stephanie Bogan: But if we have done our job me and these amazing coaches, then what we have shown you is that anything is really possible.

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00:31:24.390 --> 00:31:31.650

Stephanie Bogan: They have different models, they have different styles, they have different clients, as do all of you, but if you can get away with the idea that growth is messy.

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00:31:32.160 --> 00:31:40.020

Stephanie Bogan: And then it's an inevitable part of getting to the more and better, whatever it may be,



and for some of you it's learning to sit for tanya it might just be.

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00:31:40.560 --> 00:31:51.000

Stephanie Bogan: The work is not saying yes to all the fun stuff the work is to find this place, with my family and my life and my con so that i'm okay in the flow zone.

156

00:31:51.330 --> 00:31:57.780

Stephanie Bogan: And then, when the next more and better calls to me i'll actually be in a space to hear it instead of busy spinning my wheels.

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00:31:58.050 --> 00:32:08.340

Stephanie Bogan: And then I can make conscious choices about where I go next and how engaged and help elevate my business or my life and that's the space that I hope you all find yourself a bit more in at the end of the year.

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00:32:09.570 --> 00:32:10.710

Limitless Adviser: We don't want to miss tiffany.

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00:32:11.490 --> 00:32:12.540

Stephanie Bogan: tiffany yeah i'm sorry i'm.

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00:32:14.340 --> 00:32:14.760

Stephanie Bogan: Sorry, you are.

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00:32:15.900 --> 00:32:29.520

Tiffany Charles: We all appreciate your coaching moments like there's a lot of juice up in there, so appreciate it, and you know big wins for the year personally our family bought a second home in Scotland or I wish it was in Scotland.

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00:32:30.600 --> 00:32:32.160

Tiffany Charles: Which is good for my husband um.

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00:32:33.600 --> 00:32:44.820

Tiffany Charles: But yeah so um I don't know if everyone knows the story, but when I started, I was barely



making a survivable just living and here we are.

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00:32:45.390 --> 00:32:59.550

Tiffany Charles: That was in 2017 21 and we bought a second home and so that was a really big win this year for us as a family and and then on top of that, I.

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00:33:00.030 --> 00:33:04.590

Tiffany Charles: We are looking to scale it impact which has been a big y of mine and.

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00:33:05.310 --> 00:33:22.860

Tiffany Charles: Part of learning to really embrace the CG oC that I created was learning that we needed to get operational excellence in place, and not just pushed from external leads in but also fixed what we had to internally and we've been operating in.

167

00:33:23.970 --> 00:33:28.350

Tiffany Charles: Somewhat an antiquated way just with the infrastructure we had in technology so.

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00:33:29.070 --> 00:33:38.970

Tiffany Charles: We switched to fidelity as a custodian we're working on a Ryan we're putting an operations manual in place we've hired an outside compliance vendor we've hired a new IT vendor.

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00:33:39.240 --> 00:33:56.790

Tiffany Charles: And so we're really getting in this place where, as a team, we can operate in a limitless way to hit scale, and so it was a really big win and a lot of work and really hard and there was a level of grind that hasn't existed for a while to get to where we are.

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00:33:57.870 --> 00:34:04.620

Tiffany Charles: Today, and it's really important for our team, because we want to be in a healthy way to service the way that we want to.

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00:34:05.100 --> 00:34:10.140

Tiffany Charles: And ultimately become a \$10 million revenue firm in the next three to four years so.

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00:34:10.710 --> 00:34:21.360



Tiffany Charles: we're done being in this cold Isaak and we look forward to getting on the road to our journey to hit that 10 million, and I think we've had some pretty big breakthroughs this year to get there, so those are all wins for us.

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00:34:21.720 --> 00:34:30.810

Stephanie Bogan: yeah tiffany is remember started with another firm as part of the program and has been coaching and then, when i've joined jurors firm as the chief growth officer and partner.

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00:34:31.200 --> 00:34:43.530

Stephanie Bogan: And so you know they are a legacy firm, you know they're bringing you know multi generational issues in, and so we had one of those and i've had this conversation with some of you along the way, when we call it the how to save yourself in 90 days conversation.

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00:34:44.010 --> 00:34:54.990

Stephanie Bogan: Which is it's crazy over here it's like what do we do to get the team organized and aligned and operating on the same sheet of music and things follow through on because it's, just like the octopus so.

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00:34:55.620 --> 00:35:02.550

Stephanie Bogan: We actually ended up doing a session, following that on managing people in priorities I remember talking about some of the structures that we put in place so.

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00:35:03.090 --> 00:35:15.090

Stephanie Bogan: Some great wins from the coaches and also from all of you, and I want to call one hour i've been reading a few of them, but Adam noticed it and I want to notice it to which is christy had a great one which is, aside from being three quarters of the way to a million dollar goal.

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00:35:15.660 --> 00:35:27.150

Stephanie Bogan: Christie said that she realized that isn't The goal is just a mile marker on the journey and I won't be any happier when we get there and i'm not going to delay happiness until we are done i'm looking at you, and you and I have had that conversation along the way.

179

00:35:27.660 --> 00:35:47.340

Stephanie Bogan: We are so good at shooting and just driving and conditional living and conditional living looks a lot like this, when I he or she fill in the blank, then I will feel better be happier have more money, whatever it is, and then I will be okay and happy.



180

00:35:48.390 --> 00:35:54.180

Stephanie Bogan: And the problem with conditional living is it's conditioned on external factors which we don't control.

181

00:35:54.810 --> 00:36:02.160

Stephanie Bogan: At all ever and so when we put ourselves in the situation of when I hit this number i'll be happy, or when I get this fixed i'll be happy.

182

00:36:02.490 --> 00:36:11.220

Stephanie Bogan: Those are just the stories that we tell ourselves about that happiness is this thing happiness is a process it's an experience you guys have heard all of the cliches they're all true.

183

00:36:11.850 --> 00:36:20.160

Stephanie Bogan: And our challenges that we often get so busy and caught up in just the background noise of our daily lives that we lose the space and the clarity to remember.

184

00:36:20.730 --> 00:36:30.000

Stephanie Bogan: what's important how blessed we are what we have done so that's why I want to start this call, with the conversations about the winds because, yes, the revenue is nice.

185

00:36:30.750 --> 00:36:38.220

Stephanie Bogan: But that's not the result that people call us and thank us for I get these amazing emails from you over the year and years.

186

00:36:38.580 --> 00:36:44.970

Stephanie Bogan: And yes, we talked about the goals but it's the rate the value is in the experience that that creates for you.

187

00:36:45.240 --> 00:36:53.670

Stephanie Bogan: And if we're not really careful those stories come with us and more money or more assets or more whatever isn't going to solve for it and I as i've shared more than one spend a little bit of time there.

188

00:36:54.720 --> 00:37:08.700



Stephanie Bogan: it's really about the experience that you want to create what do you want to do, what do you want to be thinking on your day, how do you want to spend your time role do you want to play Adam really has an opportunity now to shift the role that he plays in his practice to align.

189

00:37:09.180 --> 00:37:17.400

Stephanie Bogan: With his strategy his insights sort of the things that are energy creating and inspiring to him, and we all have that opportunity we're just at different points in that journey.

190

00:37:17.730 --> 00:37:28.080

Stephanie Bogan: So christy I just want to really acknowledge you for that awareness and for sharing with the group because it's that kind of awareness and those kind of shares that that create these kind of experiences, but also help the whole Community.

191

00:37:32.760 --> 00:37:39.780

Stephanie Bogan: Alright okay we're going to talk a little bit about your challenges in a bit, but right now, I want to talk about your success spotlight so.

192

00:37:40.080 --> 00:37:48.390

Stephanie Bogan: We asked three of the advisors who've been with us for a bit to talk about their experiences you've seen the coaches, we have different people come, but at the end of the year.

193

00:37:48.720 --> 00:37:56.010

Stephanie Bogan: And throughout the year, but in this case really at the end of the year i'm want to let them share their stories about the experience that they had.

194

00:37:56.250 --> 00:38:09.180

Stephanie Bogan: Before and after limitless and what are the things like what are those levers that they pulled that really move the needle and created meaningful change in progress in their practices so with that Liz I think your first on the screen, can we start with you.

195

00:38:10.560 --> 00:38:12.750

Stephanie Bogan: you're gonna share a little bit about your limitless experience.

196

00:38:13.350 --> 00:38:15.000



Liz Hand, CFP®: Yes, i'd love to.

197

00:38:16.110 --> 00:38:21.540

Liz Hand, CFP®: um 2021 is going down in the books as my best year yet.

198

00:38:22.890 --> 00:38:38.490

Liz Hand, CFP®: And I think the biggest shift, for me, is a mindset shift of I put this in the notes, but like shifting into the role of CEO of pleasant wealth for me personally, if you would have talked to me last year I was doing a lot of leading but through.

199

00:38:40.140 --> 00:38:47.850

Liz Hand, CFP®: Like behind a curtain or like trying to get it through other people and just getting pretty frustrated with the process, because it wasn't landing, the way that I wanted to.

200

00:38:49.260 --> 00:39:02.280

Liz Hand, CFP®: And so just taking on that agency and really leading out loud was the key mindset shifts that I had this year, and when I did that many things started falling in place, the way that we want it so.

201

00:39:03.180 --> 00:39:23.310

Liz Hand, CFP®: I think the biggest win for us this year was the succession deal considering Clinton who's also on this call, and I are children of the owner and it's more than just the price or the clients, or whatever it's also it's your family it's your parents livelihood and.

202

00:39:24.480 --> 00:39:27.570

Liz Hand, CFP®: With our story like my dad got a later start in life.

203

00:39:28.830 --> 00:39:33.270

Liz Hand, CFP®: Financial advising was a second career and so like this is his retirement shot, you know.

204

00:39:34.710 --> 00:39:42.210

Liz Hand, CFP®: And so, like not wanting to screw it up for my parents, but then also wanting to create a good springboard for Clinton and I.

205

00:39:43.140 --> 00:40:00.840



Liz Hand, CFP®: that's what we were really going for so we had many, many conversations as a family that were awkward that were difficult that were sometimes funny and and I think that's kind of that leadership that I was able to bring to the table that's the biggest shift for me.

206

00:40:02.640 --> 00:40:14.130

Liz Hand, CFP®: When I started with limitless in January, and there was that kickoff conversation or kickoff packet there was the encouragement to mark Fred is off, so I did very timidly.

207

00:40:16.140 --> 00:40:20.940

Liz Hand, CFP®: And at first, I was like again leading behind a curtain or whatever I.

208

00:40:21.960 --> 00:40:27.210

Liz Hand, CFP®: didn't really like I shared with my team i'm just gonna be working from home and then eventually I was able to fully shift to be like.

209

00:40:27.630 --> 00:40:36.450

Liz Hand, CFP®: i'm going to go work out i'm going to go do something creative i'm going to set up lunches with friends and really own that space, which has been really great.

210

00:40:37.110 --> 00:40:46.290

Liz Hand, CFP®: And we were not focusing on revenue growth this year, and yet we had some substantial growth, where our focus more so was sitting on minimum fees.

211

00:40:47.010 --> 00:40:52.770

Liz Hand, CFP®: So that when we brought somebody new into the business that they were at least meeting a two and.

212

00:40:53.400 --> 00:41:07.170

Liz Hand, CFP®: 20 \$500 minimum that will not be our minimum long term, but it was the first time we've ever really stuck a stake in the ground and we've always prided ourselves on being so approachable that we've been accessible to anyone, and so we needed to shift that.

213

00:41:08.760 --> 00:41:18.510

Liz Hand, CFP®: And some some key pieces have just come in place in the last three weeks, finally, was able to hire the practice manager slash senior client services.



214

00:41:19.140 --> 00:41:31.410

Liz Hand, CFP®: person for office, which is going to really create some order for the company and allow me to be a little bit more creative a little bit more client focus bring in new clients at that caliber that I want.

215

00:41:33.150 --> 00:41:44.250

Liz Hand, CFP®: And we hit one of our revenue goals that we had of bringing in new aim for the year and so that unlocked it was kind of just a game we're playing unlocked The ability for us to sell off.

216

00:41:45.150 --> 00:42:02.250

Liz Hand, CFP®: The retirement plans of our that we were managing and so we're in motion with that and what I love about that is that it gives my dad a nice up front pop because he's selling those retirement plans to somebody else I don't have to pay for that revenue and that's off our books so.

217

00:42:03.810 --> 00:42:08.100

Liz Hand, CFP®: yeah that's that's just I guess the high level of what's gone on for us.

218

00:42:08.910 --> 00:42:16.530

Stephanie Bogan: Well, and the thing i'll just share because you didn't mention it, but I think it's just really powerful and it shows up in the other stories as well, and I think many of you have noticed this.

219

00:42:16.890 --> 00:42:23.580

Stephanie Bogan: Which is when allison and I were doing the prep call with the with these guys, this week we started the conversation with.

220

00:42:24.540 --> 00:42:31.590

Stephanie Bogan: I didn't grow as much as some of the others, but I just want to be clear, like my goal wasn't to grow my goal was to solve these other stuff I was like Liz.

221

00:42:32.100 --> 00:42:41.280

Stephanie Bogan: Years still grueling 50% while making those decisions going through that selling off part of the business transitioning clients and so.

222



00:42:41.520 --> 00:42:48.750

Stephanie Bogan: One of the things that I often share when people call me and say hey we want to grow, we want to grow Can you help me grow and i'm like absolutely.

223

00:42:49.200 --> 00:42:55.770

Stephanie Bogan: Can we talk about what you'd like to grow and when, because if you just want to get on the growth bandwagon right now, based on what you've shared with me then.

224

00:42:55.980 --> 00:43:04.920

Stephanie Bogan: I need to be clear that you want to double or triple entry thing you want to double the number of headaches and the number of hours you work and the number of staff and the number of expenses they're like, no, no, no.

225

00:43:05.850 --> 00:43:17.280

Stephanie Bogan: And i'm like well then maybe we don't start with growing maybe we understand like where and how we want to organize ourselves and, like all the things that we talked about here, and when you do that Lo and behold.

226

00:43:17.940 --> 00:43:27.210

Stephanie Bogan: I won't say it's a great promise warranty your prediction, but you see, time and time again when we're not just striving, and you know scraping for the growth.

227

00:43:27.690 --> 00:43:37.560

Stephanie Bogan: That we get really clear about what's going to be impactful what we really want we stand in our power, which is what I was chatting in the chat is like when we start to stand in our power personally.

228

00:43:38.400 --> 00:43:48.030

Stephanie Bogan: and make decisions and show up without justifying or rationalizing to ourselves or everyone else it always leaks into the business because the next thing that was said was.

229

00:43:48.330 --> 00:43:56.250

Stephanie Bogan: And then we did this and we raised our fees and we did our minimum on these transitions and so when you get that clarity and you get that level of confidence.

230



00:43:56.820 --> 00:44:04.320

Stephanie Bogan: It will manifest itself in 17 different ways I could never predict with they'll be based on your firm your style and your situation.

231

00:44:04.860 --> 00:44:13.770

Stephanie Bogan: But what you can take away from me with you is that sometimes when we want to grow, the best way to do it the best way to split us sometimes the best way to speed up is to slow down.

232

00:44:14.460 --> 00:44:21.600

Stephanie Bogan: Because that's where you get clarity that's where you get space to design a strategy and ask yourself what are the few things that I can really do.

233

00:44:22.020 --> 00:44:31.800

Stephanie Bogan: Because it's not the thousand things that you're doing right there's those hundred levers on the wall that you ultimately want to get to, but there are two or three or four or five or six and every practice.

234

00:44:32.370 --> 00:44:41.010

Stephanie Bogan: That are the next big things that are going to create that opportunity for elevation whether it's time or revenue or space or better service.

235

00:44:41.400 --> 00:44:47.790

Stephanie Bogan: So just think about you know when you think about where you're going from here what rose What role does growth play.

236

00:44:48.300 --> 00:45:00.420

Stephanie Bogan: But what happened, what do you want or need to do in the background to create an environment where that growth can actually happen without the stress in Australia, which is what you hear the tanya's and the bends and the Liz is talking about.

237

00:45:02.070 --> 00:45:09.840

Stephanie Bogan: This Thank you very much, anything you guys have any questions for Liz about her experience or how to place to you, I know we've got lots of great comments in the chat but.

238

00:45:10.980 --> 00:45:16.680



Stephanie Bogan: anyone else who else has gone through succession experience this year I know a couple of you have I just can't see you all right now.

239

00:45:18.180 --> 00:45:23.460

Limitless Adviser: One thing that I learned that live, that is, that she felt like she was the black sheep of the industry coming in.

240

00:45:24.060 --> 00:45:26.040

Limitless Adviser: On the hearing And why was that.

241

00:45:27.930 --> 00:45:36.240

Liz Hand, CFP®: Well it's funny to me, I was telling Clinton right before this call I I was listening back to a coaching conversation I had with ELISE.

242

00:45:36.630 --> 00:45:44.280

Liz Hand, CFP®: Last year 12 eight of 2020 and in it, I was saying, like i'm terrified of this, this is where I finally get found out like.

243

00:45:44.850 --> 00:45:56.970

Liz Hand, CFP®: I am the black sheep of the industry, and this is just going to prove that and then I come into this call today and i'm also like this is another mindset shift thing that I have to get through pardon my tears I don't mind them, but maybe you do.

244

00:45:58.590 --> 00:46:12.210

Liz Hand, CFP®: But like there's this piece of like if i'm not the black sheep if I stop operating out of that and I accept that i'm actually doing pretty well our family businesses doing fantastic and meet as a as a leader as a financial planner i'm actually.

245

00:46:13.980 --> 00:46:16.470

Liz Hand, CFP®: A badass I think I type that in one of the.

246

00:46:18.000 --> 00:46:35.160

Liz Hand, CFP®: And the tribe, and like, if I can accept that and not feel intimidated even coming into this conversation because I realized like right now my heart's pounding and I still have a fear of presenting as someone who is excellent so um yeah.



247

00:46:37.110 --> 00:46:44.010

Stephanie Bogan: it's awesome it's do you guys notice just even how hard like Liz is so in that space, but you can still feel a little bit like.

248

00:46:45.000 --> 00:46:56.790

Stephanie Bogan: That reservation that we put ourselves through and so Liz is just done, I think a really good job this year of creating awareness, for herself about how great the stories in our head are really holding her back and.

249

00:46:57.210 --> 00:47:08.730

Stephanie Bogan: being honest with yourself about them, acknowledging them and then stepping into that uncomfortable space and then Lo and behold, nobody died and greet shit happens like yay that's it that's what we ultimately want right.

250

00:47:09.180 --> 00:47:18.180

Stephanie Bogan: And we're also scared and that's what I do so much love about this Community, as we can, and that Michael and Carl are constantly telling me that's what they love is we get to have the very real conversations.

251

00:47:18.630 --> 00:47:30.840

Stephanie Bogan: that come with real success when you think about really successful people or people in masterminds and that you know these are the conversations that they're having they're not having the pat board room conversations, where everyone says everything's okay and perfect.

252

00:47:30.840 --> 00:47:40.950

Stephanie Bogan: Like nothing you know growth doesn't happen in that ecosystem, so I think there's some great stuff there Liz and I hope you and a lot of you have had very similar experiences in terms of learning to.

253

00:47:41.400 --> 00:47:54.420

Stephanie Bogan: really start to own your capability and own your power without feeling like someone's going to come get you someone's going to take it away from you right you're going to be found at any moment, I promise you every time you up level.

254

00:47:54.660 --> 00:48:05.940



Stephanie Bogan: That stuff's going to show up a little bit every time I up level and, like oh Okay, am I ready for this, I have no idea but i'm doing it anyway right, then, and they haven't all been perfect, by the way.

255

00:48:07.020 --> 00:48:11.520

Stephanie Bogan: But that's the part that we get to his growth is messy I guess that's our theme for today.

256

00:48:12.270 --> 00:48:15.240

Stephanie Bogan: Liz Thank you so much for that chair and I think you know.

257

00:48:15.300 --> 00:48:24.690

Stephanie Bogan: it's not about tears it's just about like the fact that we can create a space where we can really share what we're going through and how we're growing personally and professionally I think is the kind of space that we want to create, so thank you for being.

258

00:48:25.110 --> 00:48:27.780

Stephanie Bogan: So open about your experience and everything that went into it.

259

00:48:29.370 --> 00:48:30.870

Stephanie Bogan: Neil, are you ready to de.

260

00:48:31.770 --> 00:48:37.260

Neal Albritton: I am especially after Liz just went so I have nowhere to go but down from there.

261

00:48:38.520 --> 00:48:46.410

Neal Albritton: Actually, was I didn't put in the chat but awesome story I loved every minute of it and I can't wait to spend more time with you next year and leaders because.

262

00:48:46.740 --> 00:48:54.240

Neal Albritton: we're also a family business over here my heart's been pounding waiting for my opportunity to speak and getting stuck on the stage like this, too, so.

263

00:48:55.170 --> 00:49:02.070



Neal Albritton: I feel you very much, so so but let's get started, for me, so our Year was very similar Liz's in the fact that.

264

00:49:02.490 --> 00:49:10.950

Neal Albritton: This was not meant to be a growth year for us growth was just a byproduct of it to this year was my first year in limitless and it was an opportunity for us to really.

265

00:49:11.370 --> 00:49:18.930

Neal Albritton: Think of it as a foundational year we want this year to be let's get all the pieces in place, we need to as a team and me as an individual CEO.

266

00:49:19.320 --> 00:49:28.500

Neal Albritton: And then next year let's focus on really turning on that growth engine but identifying what are we growing for what are the growth engines we're going to be using and everything like that so.

267

00:49:29.100 --> 00:49:37.530

Neal Albritton: I have stopped coaching back in 2019 when we did an ra change over to Carson and I found myself being.

268

00:49:37.920 --> 00:49:49.680

Neal Albritton: Very stressed being very reactive in life in and just trying to catch all the different balls that were in the air, so joining limitless to me was excellent, because now i'm in a much better place i'm calm content i'm happy.

269

00:49:50.160 --> 00:49:57.930

Neal Albritton: me and the entire team has direction and we're much happier for it, so there were really three main levers that we focused on this year.

270

00:49:58.620 --> 00:50:09.840

Neal Albritton: For our foundational year and the first one was the very first lesson which was what is the vision, what are we growing towards and so that was a real eye opener for me because I had written our vision years ago.

271

00:50:10.230 --> 00:50:15.930



Neal Albritton: And we had accomplished some of those mile markers, and now it was time to rewrite the vision again and understand what we were growing towards.

272

00:50:16.230 --> 00:50:22.890

Neal Albritton: Not only for me in the business that I wanted to have as I buy it out from my father, but also what is our team, want to have going forward as well.

273

00:50:23.250 --> 00:50:28.410

Neal Albritton: And so stephanie is absolutely right, which is as when your vision is clear your decisions are easy.

274

00:50:28.800 --> 00:50:37.230

Neal Albritton: So all the other decisions, all the other levers, we had to pull after the vision was in place was very simple to understand and the very next lever that we went to pull lever number two.

275

00:50:37.530 --> 00:50:44.400

Neal Albritton: Was understanding our story, and what we want our brand to be going forward our business is constantly evolve, just like many of yours.

276

00:50:44.670 --> 00:50:53.790

Neal Albritton: It keeps evolving over time and morphing into what we wanted to become, and so we wanted to keep narrowing down our niche into something and actually have a niche.

277

00:50:54.090 --> 00:50:58.770

Neal Albritton: i'm not going to be as crazy micro niche that Adam is at this point in time, maybe in the future, I can be.

278

00:50:59.130 --> 00:51:07.140

Neal Albritton: But for right now I was just happy to say i'm really good at what we do for anyone and kind of narrow it down to business owners and highly successful families.

279

00:51:07.530 --> 00:51:11.640

Neal Albritton: And with that idea in mind, we took a lot of the lessons from the.

280



00:51:12.180 --> 00:51:18.240

Neal Albritton: Summer micro workshops that we had in park city and basically created a brand new story video.

281

00:51:18.480 --> 00:51:28.050

Neal Albritton: We created a brand new website and we basically stuck our flag in the ground and said, this is our identity, this is, who we are, this is, who we love to work with, and this is, who we serve really well.

282

00:51:28.440 --> 00:51:38.310

Neal Albritton: And if we are attracted to that awesome let's do business together if you're not that's Okay, I know plenty of other advisors out there, I in my limitless program that can certainly help you out.

283

00:51:39.180 --> 00:51:47.280

Neal Albritton: And then, last but not least, the third level that we pulled was more in the search category, was the first time we instituted surge and we wanted to do that because.

284

00:51:47.490 --> 00:51:53.910

Neal Albritton: We wanted that structure and cadence to the practice my team loves the idea now of doing searches in the spring in the fall.

285

00:51:54.210 --> 00:52:04.530

Neal Albritton: because it gives us clarity and a structure for the entire year we know when we're serving clients, we know when we're going after CEOs and business opportunities we know when we're chasing after.

286

00:52:04.830 --> 00:52:11.490

Neal Albritton: New revenue opportunities from our search meetings and so at the end of the day after pulling all three of those lovers.

287

00:52:11.850 --> 00:52:17.100

Neal Albritton: we're just in a much better place the practice and the team were more energized and excited about.

288

00:52:17.850 --> 00:52:27.660



Neal Albritton: than ever before, and for me personally, from a lifestyle perspective I love it i'm working fewer hours than ever next year i'm going to take my Fridays completely off.

289

00:52:28.020 --> 00:52:33.600

Neal Albritton: And i'm going to use that Friday to chase after my passion and my hobbies so monday's my CEO day.

290

00:52:33.960 --> 00:52:46.020

Neal Albritton: Tuesday, Wednesday, Thursday i'm going to be a revenue producing advisor and then Fridays are my day to do with as I please so it's been a wonderful ride i've enjoyed meeting some of you so far and I can't wait to actually meet more of you next year.

291

00:52:47.010 --> 00:52:55.890

Stephanie Bogan: That was awesome meal for somebody who was nervous you really can have nailed that that's incredibly polished and articulate and organized and amazing.

292

00:52:56.370 --> 00:53:03.000

Stephanie Bogan: So, and I just love that like what you notice is and that's what I truly Am I really We really do work on this here is.

293

00:53:03.510 --> 00:53:13.290

Stephanie Bogan: it's you know you guys will all apply it in a different way of different styles, some of you are more systems and efficiency rented some of you are more feeling and related, but it still works.

294

00:53:13.770 --> 00:53:24.090

Stephanie Bogan: And you can really let it meet you where you are and here's what I heard Neil talk about what your three really big levers vision voice vehicle.

295

00:53:25.290 --> 00:53:35.340

Stephanie Bogan: Vision like clarity, who are we were, and I know we're like Oh, we don't need that it's just whatever we don't need goals you can do Okay, without them, you truly can.

296

00:53:35.880 --> 00:53:43.470

Stephanie Bogan: Even more important than goals, by the way, goals are really good at creating those kind of bumpers like the Bowling alley the guardrails for your brain.



297

00:53:43.890 --> 00:53:55.920

Stephanie Bogan: what's really motivating from a change perspective, and you have all right it's it's it's the personal motivation is you've committed to create an outcome you've raised the bar in some way.

298

00:53:56.190 --> 00:54:04.320

Stephanie Bogan: and goals are good mile markers, but when you create those outcomes two meals point and deliver this point and to the code, you know the conversations that we have is.

299

00:54:04.680 --> 00:54:13.410

Stephanie Bogan: You can create that alignment that says, does this fit with what I want like hey this is going to be revenue, but i'm going to be doing it, you know 10 o'clock at night, because this doesn't fit.

300

00:54:14.040 --> 00:54:22.500

Stephanie Bogan: No, I don't want to do that and you'll hear people over time, get more and more you just heard, Neil say it like whatever my middle name is X you don't have to hire me it's okay I.

301

00:54:23.340 --> 00:54:33.630

Stephanie Bogan: didn't hear any takers there like I didn't hear anything terrifying in the background, and that part does get easier and easier and you really do get to the point, for those of you that are still working on it, where you're like.

302

00:54:33.930 --> 00:54:42.210

Stephanie Bogan: Oh, it doesn't fit okay like there's just no place for it to land anymore there's no story there it just doesn't fit some people brown here, some people have red hair, some people are.

303

00:54:42.510 --> 00:54:49.590

Stephanie Bogan: Some people aren't like there's no reaction in that so vision is really important, because it really does let you know.

304

00:54:50.280 --> 00:54:55.920

Stephanie Bogan: Is what i'm doing a line vision creates a roadmap for change, because as soon as Neil got that vision.

305



00:54:56.430 --> 00:55:01.500

Stephanie Bogan: Then it's like Oh well, now I can see the gaps between me in that specific outcome.

306

00:55:01.770 --> 00:55:11.670

Stephanie Bogan: hey we aren't running in a way that I feel confident when I leave and I don't feel like i'm running the business and working in in a way that feels good Okay, how do I fix that Oh, we have this muddle schedule thing.

307

00:55:11.940 --> 00:55:22.260

Stephanie Bogan: So when you get that clarity, it makes it easier to know what and how and when you get it you'll always find a way or make one you'll figure it out you'll join a coaching program you'll ask a friend.

308

00:55:22.890 --> 00:55:24.960

Stephanie Bogan: When you don't have that conviction.

309

00:55:25.620 --> 00:55:35.430

Stephanie Bogan: that's when we lack the vision, so one of the things we're doing just for those of you who will be here next year because they need this is one of the things that once you do the lesson right it's sometimes it hits you and sometimes it doesn't so we're starting.

310

00:55:36.180 --> 00:55:42.210

Stephanie Bogan: will start quarterly what I call strategy sessions that are just we've got some structure that we're putting in place around like.

311

00:55:42.390 --> 00:55:49.170

Stephanie Bogan: I told you guys recruiting that really cool roadmap to the program so you can actually keep track of what you're doing and I get overwhelmed and your personal path.

312

00:55:50.160 --> 00:55:58.260

Stephanie Bogan: But we're going to put that structure in place and have quarterly calls just on strategy and vision, where you're like hey I think I want to do this, but where do I go next.

313

00:55:58.920 --> 00:56:03.360

Stephanie Bogan: So we're actually going to pull that in in a more organized way, because when you get



that clarity.

314

00:56:03.660 --> 00:56:11.760

Stephanie Bogan: what's next is never the issue so if you don't have clarity about what to do, or what you're working on whether you're here just in your practice next year in general.

315

00:56:12.300 --> 00:56:20.790

Stephanie Bogan: It means you have a vision clarity issue, because when you fix that you there's always options and then right then you're just back in business mode of picking the options that work best for you.

316

00:56:21.420 --> 00:56:24.990

Stephanie Bogan: So vision, then you'll really hit, on the other big thing voice.

317

00:56:25.680 --> 00:56:38.940

Stephanie Bogan: Like the clearer, you are, and the more confident compelling you are in that voice, the more attractive, it is to people I would you agree with that Neil like we're so worried it's going to push people away, and it does, but what we forget.

318

00:56:39.330 --> 00:56:48.210

Stephanie Bogan: Is that makes room for all the other people, even though they're small and number two just flow straight to us without all that resistance, because we're just so.

319

00:56:48.600 --> 00:56:56.310

Stephanie Bogan: focused and open, I mean when I mean I know you shared that was your experience, but like how did, how did that feel on the before and after for you like, what did you notice there.

320

00:56:57.240 --> 00:57:05.880

Neal Albritton: Oh, it was meaningful for me, because a confidence was just awesome right it's it helps with my I always have a perpetual.

321

00:57:07.320 --> 00:57:15.630

Neal Albritton: imposter syndrome going on in my head, so making sure that voice was nailed down perfectly it was good for us also our marketing channels for next year, our seo wise.



322

00:57:15.900 --> 00:57:23.970

Neal Albritton: and educational webinars and ever since we change that voice, and we really narrowed down and spoke with our story and our brand name with vision.

323

00:57:24.630 --> 00:57:36.630

Neal Albritton: or excuse me with confidence, our coi referrals have actually started shooting up there, fewer number but they're much, much greater and quality, which is what we're looking for so it's been great for us yeah.

324

00:57:36.660 --> 00:57:40.710

Stephanie Bogan: With the clearer, you are everybody lives in to see a background noise everybody.

325

00:57:41.190 --> 00:57:47.730

Stephanie Bogan: The clearer, you are, the more pointed the more precise that message it cuts through that background noise and it hits people in their brain.

326

00:57:48.300 --> 00:57:56.070

Stephanie Bogan: And again if they're a fit if there's rate if there's some alignment and their needs that will create curiosity it doesn't mean that they're all going to hire you.

327

00:57:56.550 --> 00:58:04.590

Stephanie Bogan: right they have their own stories about fees and value and money and timing and what's going on in their life but it's going to create that curiosity and when you create continuous curiosity.

328

00:58:05.370 --> 00:58:17.130

Stephanie Bogan: you're going to create a continuous steady pipeline and the clearer you get the stronger that gravity becomes and it's one of the scariest things that you'll do, but what the reason that we share these stories over and over again, is because it is.

329

00:58:17.430 --> 00:58:27.990

Stephanie Bogan: Hopefully confidence inspiring and then the third thing, and this is not to be underrated because it's the back end which is vehicle it's the delivery system, we can have a great vision and we can tell a great story.



330

00:58:28.800 --> 00:58:37.080

Stephanie Bogan: Well, number one is that devalued clients, we have to deliver that and so surges your service models your systems right your people process and platform.

331

00:58:37.590 --> 00:58:46.860

Stephanie Bogan: You know, pick one or two of those things a year and it's going to make a huge change so think about where you are envision invoice and in the vehicle.

332

00:58:47.190 --> 00:58:55.350

Stephanie Bogan: And then the value piece obviously as advice and all that I know that's all worked in there, too, but those I think those are three big takeaways that we should all have those three things.

333

00:58:55.740 --> 00:59:01.830

Stephanie Bogan: And then there's layers to those right you get more and more clear in the vision you put benchmarking in place you do things with the team.

334

00:59:02.040 --> 00:59:10.380

Stephanie Bogan: You go deeper into service models so there's you know you continuously deepen, but those are three really important, I will call him big rocks to check off.

335

00:59:11.850 --> 00:59:22.410

Stephanie Bogan: You guys comments or questions for Neil, I saw a lot of positive thoughts comments in the chat so meal thanks for sharing your story and your progress and we're super excited about having you guys and leaders next year it's gonna be super fun.

336

00:59:23.820 --> 00:59:28.950

Stephanie Bogan: All right, let's see where my PowerPoint go allison is up next to me losing.

337

00:59:37.230 --> 00:59:38.880

Limitless Adviser: You have it back, we have verge next.

338

00:59:39.630 --> 00:59:40.140

Stephanie Bogan: All right.



339

00:59:40.800 --> 00:59:41.970

Limitless Adviser: Can you see the PowerPoint.

340

00:59:42.510 --> 00:59:47.580

Stephanie Bogan: I can't use my pull it up quick so everyone can take a quick look as and then you can play it back on verge.

341

00:59:49.470 --> 00:59:50.010

Stephanie Bogan: Every.

342

00:59:50.790 --> 00:59:52.740

Virg Cristobal, CFP®: Young here, I can see the slide.

343

00:59:52.830 --> 00:59:55.740

Stephanie Bogan: But i'll maybe it's probably my view don't mind me.

344

00:59:57.510 --> 01:00:09.630

Virg Cristobal, CFP®: i'm a solo i'm I, and I started listening in 2020 last year and this year has been transformational for me, especially on the personal side of things.

345

01:00:11.760 --> 01:00:21.750

Virg Cristobal, CFP®: And I think one of the things that I went through a lot of turbulent change of the last two years and some big changes I actually moved.

346

01:00:22.860 --> 01:00:43.710

Virg Cristobal, CFP®: moved two times move firms two times, instead of 15 months and my first movers bd tbd and then the second one was beauty to independent ra and for lots of different reasons, but you know, primarily, you know they were really kind of toxic environments, you know as part of different partnerships.

347

01:00:45.180 --> 01:00:51.120

Virg Cristobal, CFP®: Where it was just you know just we were just wasn't right.

348



01:00:52.530 --> 01:01:02.040

Virg Cristobal, CFP®: And a lot of kind of conflict and whatnot and the thing that I think the biggest thing that I worked on with limitless early on, was really kind of the mindset stuff.

349

01:01:03.210 --> 01:01:09.270

Virg Cristobal, CFP®: And really trying to understand like what was causing these issues, maybe in the partnership or in my role in the partnership.

350

01:01:09.900 --> 01:01:17.190

Virg Cristobal, CFP®: But ultimately kind of what it came down to was that I realized that I was seeking validation I was told us constantly seeking validation.

351

01:01:17.850 --> 01:01:29.610

Virg Cristobal, CFP®: From Maybe my partner's my peers with expectations of industry or whatnot and realized with limitless that I don't need to seek that validation but.

352

01:01:30.360 --> 01:01:42.420

Virg Cristobal, CFP®: You know i've always been kind of confidence with myself, but even with that confidence, I was wanted, you know, to get that validation that you know that what I was doing was the right thing and so.

353

01:01:43.680 --> 01:01:55.050

Virg Cristobal, CFP®: But I think that was the kind of pilot biggest biggest thing that that was something that they wanted to work on early early on and that's what I did, and I think it's I mean I think that's changed everything.

354

01:01:57.540 --> 01:02:08.250

Virg Cristobal, CFP®: But I think, so the the biggest the biggest the biggest changes i've had is really on the business side, the number i'm kind of most proud of is really my.

355

01:02:09.180 --> 01:02:16.860

Virg Cristobal, CFP®: My evil, because you know, I was hovering in the mid 30s for a long time, like just just for several years and just trying to find.

356

01:02:17.430 --> 01:02:33.720



Virg Cristobal, CFP®: ways to kind of crack that and whatnot and it wasn't until I was able to kind of you know, have full control of everything that's able to to you know, really, you know get that above like consistently about in the mid 70s, sometimes i'll crack at and i'll be kind of wow.

357

01:02:34.830 --> 01:02:47.430

Virg Cristobal, CFP®: But you know i've had to do with choosing to raise fees on to what my true market value was, and you know and learning to say no to the not right fit client.

358

01:02:49.350 --> 01:02:51.300

Virg Cristobal, CFP®: And just really kind of focusing on my niche.

359

01:02:52.920 --> 01:02:55.560

Virg Cristobal, CFP®: The I think the other.

360

01:02:56.640 --> 01:03:02.220

Virg Cristobal, CFP®: In terms of days yeah and I yeah I never thought I would ever get to the stage but i'm working with 30 hours a week.

361

01:03:04.470 --> 01:03:06.210

Virg Cristobal, CFP®: You know, sometimes probably less than that.

362

01:03:07.470 --> 01:03:10.560

Virg Cristobal, CFP®: You know, start taking friday's off in October of this year.

363

01:03:11.670 --> 01:03:21.810

Virg Cristobal, CFP®: The biggest one, the biggest kind of lifestyle changes was this past summer I was able to take the summer off and never had that kind of free time before never.

364

01:03:23.370 --> 01:03:29.520

Virg Cristobal, CFP®: And I don't stephanie recalls, but we had a coaching call and it's like I didn't know what to do in my free time.

365

01:03:30.300 --> 01:03:36.840

Virg Cristobal, CFP®: Because i'm so used to grinding like like i'm just you know I just you know my



entire career has been grinding grinding.

366

01:03:37.560 --> 01:03:53.130

Virg Cristobal, CFP®: and never kind of had this kind of free time it actually created anxiety because i'm not used to not you know, create this executive like what am I doing, am I not paying attention um but yeah I found that it didn't have anything to do in the summer.

367

01:03:54.150 --> 01:03:54.750

Virg Cristobal, CFP®: And so.

368

01:03:56.880 --> 01:03:58.320

Virg Cristobal, CFP®: The other thing is that.

369

01:04:00.750 --> 01:04:05.610

Virg Cristobal, CFP®: When I looked at, you know niches has made things easier.

370

01:04:06.720 --> 01:04:12.510

Virg Cristobal, CFP®: it's been marketing easier it's been my messaging easier, I think those are my keys to success.

371

01:04:15.210 --> 01:04:27.360

Virg Cristobal, CFP®: And I really haven't had you know i've had i've had the chance to go over this with with stephanie stephanie and the team at that list you know they didn't they didn't say save my business because i'm the type that.

372

01:04:28.050 --> 01:04:40.770

Virg Cristobal, CFP®: would write it out and figure out, you know what to do business, but what what they did was saved my quality of life and and therefore my family's quality of life, as well, which i'll always be grateful for.

373

01:04:41.910 --> 01:04:45.960

Virg Cristobal, CFP®: and share this kind of last week, but the biggest compliment that I got.

374

01:04:48.150 --> 01:04:57.720



Virg Cristobal, CFP®: Was from my wife some point, a couple months ago we were just talking about my work and whatnot and then the biggest company she gave me, she said that I don't complain about work anymore.

375

01:04:59.700 --> 01:05:04.470

Virg Cristobal, CFP®: I used to complain about workplace conflict with partners like the conflicts that was created and whatnot.

376

01:05:05.640 --> 01:05:07.800

Virg Cristobal, CFP®: And she doesn't hear me talk anymore.

377

01:05:08.940 --> 01:05:18.240

Virg Cristobal, CFP®: And so I do consider myself on my transformation, you know I realized i'm just scratching the surface on what's possible.

378

01:05:18.840 --> 01:05:33.480

Virg Cristobal, CFP®: and not a matter of just the basics, including my mindset which isn't basic but you know i've gotten rid of the things that getting in the way and they can now really build a business that I want to build so i'm very excited about the future yeah.

379

01:05:33.930 --> 01:05:39.690

Stephanie Bogan: that's awesome there's so many great things in the chat Tom just reducing conflict is worth millions tanya I know you will.

380

01:05:40.410 --> 01:05:51.180

Stephanie Bogan: feel very much the same when when we don't feel good we can't do good and there's there's no part of that kind of success that satisfying and I learned that very much the hard way.

381

01:05:52.230 --> 01:06:02.070

Stephanie Bogan: But when you when you learn that and very much to christie's point and divergence conversation when you realize success is a state of mind right that happiness is a state of being.

382

01:06:02.790 --> 01:06:10.440

Stephanie Bogan: Not a state of doing, and we are so good as humans, we are conditioned to assign are worth to something.



383

01:06:11.220 --> 01:06:20.940

Stephanie Bogan: that's just how culture and society work but it's doing or producing or proving or hitting goals like who i'm a person that always hits my goals.

384

01:06:21.420 --> 01:06:30.060

Stephanie Bogan: And that's great like you can in coaching we talked about like we call it goal achievement from a place of ego it's not bad in that.

385

01:06:30.330 --> 01:06:46.230

Stephanie Bogan: You can from a place of ego like hey I need to because right which is very different than it being something that's just authentically what you want to do, you can hit your goals, you can have a great life I did all of it but that's entirely different from sitting with yourself.

386

01:06:47.370 --> 01:06:55.170

Stephanie Bogan: Being able to look at your experience, even when it's not 100% perfect and be like I feel good about this not perfect, but like I can figure it out.

387

01:06:55.560 --> 01:07:05.580

Stephanie Bogan: i've got the tools that I need it's okay to not be doing something all of the time because that's not what my worth is and so it's really about.

388

01:07:06.060 --> 01:07:16.440

Stephanie Bogan: You know what verge is really talking about is sort of reassessing where we define our words and our value and what we attach it to and not attaching it to outcomes.

389

01:07:17.160 --> 01:07:30.750

Stephanie Bogan: goals clients fees whatever is that of That means that we can be in a state of being and one of my clients earlier this year, said to me is the CEO of a large firm and he said I just really have a hard time sitting still.

390

01:07:31.920 --> 01:07:35.400

Stephanie Bogan: And I said, you have a hard time sitting still or do you have a hard time sitting with yourself.



391

01:07:37.020 --> 01:07:43.650

Stephanie Bogan: And he was like oh I don't know i'm gonna try that right and he's like I just don't know what to do with myself like.

392

01:07:44.340 --> 01:07:53.700

Stephanie Bogan: never given himself permission like we're supposed to be working or serving or family or you know cleaning the House like we don't even create space to.

393

01:07:54.000 --> 01:08:01.800

Stephanie Bogan: be free and have fun and I can't tell you how many, and you know it's true for all of you, sometimes we get stuck in this moment, where we have to solve something.

394

01:08:02.100 --> 01:08:10.920

Stephanie Bogan: what's the big decision to make what's the niche what should I stay in the firm, should they leave the firm and sometimes you know it's just giving ourselves permission to sit with things.

395

01:08:11.700 --> 01:08:20.880

Stephanie Bogan: just creating some space, so that we can get really clear on who we are and what we want, without those stories and attachments and the all the validation like.

396

01:08:21.360 --> 01:08:29.640

Stephanie Bogan: Who am I, how do I want to show up who do I want to be as a professional who do I want to be as a parent who do I want to be as a CEO and as an advisor and how do I bring.

397

01:08:30.150 --> 01:08:39.720

Stephanie Bogan: I never say balance because balance implies that when one thing goes up another goes down, but how do we bring some equilibrium to that experience, so that we can feel good as we, as we feel all of those rules.

398

01:08:40.200 --> 01:08:50.160

Stephanie Bogan: So I think you know I think the intangibles if you listen everybody's growing, I mean the thing I love about this is that we're breaking rules that say you know, to make more money.

399

01:08:50.640 --> 01:08:58.410



Stephanie Bogan: And to make more have more satisfaction you're supposed to write work more hours and what we see here, time and time again, is that you can really decouple.

400

01:08:58.920 --> 01:09:09.810

Stephanie Bogan: That, and you can two X and three extra practice and double your inbox and still really maintain a quality of life and actually reduce your hours by right pulling all this business levers that we talked about.

401

01:09:10.470 --> 01:09:18.810

Stephanie Bogan: So verge I think that's a phenomenal story, and thank you for sharing and I see because the books over my shoulder when you guys the books over my shoulder I have lots of books.

402

01:09:19.560 --> 01:09:26.130

Stephanie Bogan: How we reason, this is a very good book it's very thick you have to be in a cerebral moment atomic habits, one of my favorite books.

403

01:09:26.490 --> 01:09:37.140

Stephanie Bogan: 10% happier if you guys haven't read that you should definitely reach it power of habit is a great little coffee table book it's called 212 degrees does anybody know this story.

404

01:09:38.580 --> 01:09:40.380

Stephanie Bogan: What temperature does water boil at.

405

01:09:41.640 --> 01:09:43.590

Adam Cmejla, CFP®: One degree creates massive results.

406

01:09:44.460 --> 01:09:45.330

Stephanie Bogan: 11 degrees.

407

01:09:45.600 --> 01:09:59.070

Stephanie Bogan: 212 degrees a 211 degrees water is hot at 212 degrees it boils what's that one degree difference and so it's a very cool little book it's very motivating.

408

01:10:00.690 --> 01:10:09.270



Stephanie Bogan: And then i've got a big dictionary and marketing plan and the art of possibility all kinds of stuff I had like thousands of books.

409

01:10:10.500 --> 01:10:14.820

Stephanie Bogan: That you might bookshelves you guys, it would blow your mind I love books, yes.

410

01:10:15.600 --> 01:10:24.510

Stephanie Bogan: And we are doing the recommended reading list next year we're doing some updates to that as well, but I will keep you guys posted on good books and stuff in the future we're going to do some things around that as well.

411

01:10:25.410 --> 01:10:37.140

Stephanie Bogan: Alright, so let's take a moment we have Liz and Neil and verge share their sort of transfer transformations and their stories for their time the coaches shared a little bit about their big wins you guys dropped some in the chat.

412

01:10:37.650 --> 01:10:46.050

Stephanie Bogan: So when you think about to axing or three axing from where you are not because you have to, by the way, so that could be time.

413

01:10:46.530 --> 01:10:59.310

Stephanie Bogan: It could be income, it could be evolved, it could be great value and role that you play, but when you think about that next big leap what's the biggest lever that that you need to pull between here and there.

414

01:11:00.480 --> 01:11:01.890

Stephanie Bogan: take a moment to reflect on it.

415

01:11:17.580 --> 01:11:21.870

Stephanie Bogan: Like that josh an inch an hour to feed a day it's a good quote.

416

01:11:25.170 --> 01:11:38.160

Stephanie Bogan: My correction incremental effort will inevitably get you to a better place if you apply it consistently alright drop some of your lovers in the chat let's see josh the tragically for that's not a lover.



417

01:11:40.230 --> 01:11:44.550

Stephanie Bogan: All right, let's see who's a John Munson I see you there, do you want to share your next big lever.

418

01:11:47.580 --> 01:11:48.300

Jon Munson: Is Stephanie.

419

01:11:49.800 --> 01:11:54.510

Jon Munson: Yeah I mean the two that immediately come to mind and it's.

420

01:11:55.560 --> 01:12:06.360

Jon Munson: It's kind of been a theme for 2021 is basically delegating down to my team members I was I didn't have any TEAM members until February 2021 I I.

421

01:12:06.990 --> 01:12:17.850

Jon Munson: Signed on with total office and that's been a real huge game changer But when I look at what I've delegated down I know there's so much more I can do another big part of that is system system ization.

422

01:12:19.980 --> 01:12:23.160

Jon Munson: I just you know those are the two things that come to mind for me.

423

01:12:24.690 --> 01:12:27.090

Stephanie Bogan: What's your plan of attack on the system ization.

424

01:12:28.980 --> 01:12:41.010

Jon Munson: You know what we we have we have weekly meetings, and we also have quarterly resets and so part of that is identifying what's going to move the needle most the three of us get together.

425

01:12:42.150 --> 01:13:00.030

Jon Munson: And you know I lead the discussion saying hey This is where we need to get over the next 90 days and take from their gig basically but also, at the same time, you know part of it is I've got I've got awesome TEAM members, particularly my my lead.



426

01:13:01.140 --> 01:13:12.570

Jon Munson: My lead assistant Vicki who has a lot more years experience than I do, so I really rely on her to share, and I think between the two of us we kind of come up with a better answer, because I have a vision of how I.

427

01:13:13.170 --> 01:13:27.570

Jon Munson: How I wanted to business to be, and she has the more practical knowledge to say, well, this is what I've seen in this world works and this doesn't work so it's been a it's been a great 2021 and I'm going to continue to build on that in 2022 and I think the big thing is just you know.

428

01:13:29.340 --> 01:13:33.450

Jon Munson: favorable communication with the people that you, you work with.

429

01:13:34.920 --> 01:13:45.540

Stephanie Bogan: yeah and you know, the thing that's nice is it's it sounds to me like you've got an organic process it's not like oh my God I've got 92 things it's right incrementally, what are we working on next you're doing it with her.

430

01:13:45.900 --> 01:13:53.160

Stephanie Bogan: Involvement equals investment so when you build those machines with your team, whether it's one person or multiple they take ownership and.

431

01:13:53.550 --> 01:14:01.170

Stephanie Bogan: Then they're sort of in in there with you, if you will, and you'll find that you'll get a lot of traction out of that and we'll we'll just focus on I know systems, a lot more next year for us.

432

01:14:01.170 --> 01:14:08.340

Jon Munson: yeah well, one thing I will say is like, if I put a big long laundry list of what we should be doing, whether it's in.

433

01:14:08.970 --> 01:14:18.960

Jon Munson: You know, we don't have a sauna but to the extent that we use in our CRM then it's easy to say Oh, you know we're not going to get them, but if I only put if we only put like 333 or four things to focus on.



434

01:14:19.410 --> 01:14:32.700

Jon Munson: Then it's like you know what let's just focus on these, and then we can we can add later so so that's been an effective that's kind of been a effective brain hack this year's don't look at the long list let's just let's just grab the top three or four and focus on those.

435

01:14:32.760 --> 01:14:36.180

Stephanie Bogan: and love and enjoy today what was it an inch an hour to feed today.

436

01:14:37.680 --> 01:14:40.500

Stephanie Bogan: Great incremental improvement will get you there every time.

437

01:14:41.070 --> 01:14:47.850

Stephanie Bogan: that's awesome all right, and I know we've got the coaches on I can't see them all, with my camera view right now, but if you guys have questions for them they've.

438

01:14:48.240 --> 01:14:54.720

Stephanie Bogan: they've got a lot of experience to share with you drop those in the chat or feel free to jump in and ask them questions, while they're here as well.

439

01:14:55.320 --> 01:15:00.180

Stephanie Bogan: Adam was just sharing any one of the things that tiffany had shared with us, and one of our coaches meetings.

440

01:15:01.110 --> 01:15:11.670

Stephanie Bogan: That were either doing or have applied and I don't know if you've seen it in the chat but they eliminated all eyes and minds out of their communication so everything is me we us or our.

441

01:15:12.690 --> 01:15:21.660

Stephanie Bogan: Which is really interesting tiffany I was writing an email, the other day, and I was like oh I, and I was like i'm going to change it to me, so I think most of our group communications do but we've even noticed that so.

442

01:15:22.020 --> 01:15:29.460

Stephanie Bogan: it's just those little things that you're doing to continuously message right, whether.



you have a team of two or a team of 25 that there is.

443

01:15:29.820 --> 01:15:34.410

Stephanie Bogan: A we here and that they're building a relationship with with the firm, so I think that's great.

444

01:15:35.070 --> 01:15:47.580

Stephanie Bogan: Alright let's see what else you guys have so Pam let's see Pam is gonna hire an operations manager Joseph you've got hire another pair of planner Mike OPS manager, so I feel like it's the it's the year of leverage is that what i'm hearing.

445

01:15:49.260 --> 01:15:58.890

Stephanie Bogan: Yes, staffing can really like the goal is to put in that much effort and get out that much production with people process and platform so For those of you that are looking at.

446

01:15:59.250 --> 01:16:09.960

Stephanie Bogan: Expanding your teams it's a very good time to be hiring in that there are a lot more people available in a virtual world and it's an interesting time to be hiring is you're looking for those quality people.

447

01:16:10.290 --> 01:16:15.630

Stephanie Bogan: That can work remotely and we've got lots of resources for you there if you want to avail yourself of those.

448

01:16:16.440 --> 01:16:25.500

Stephanie Bogan: Right so let's see Ryan stepping up adding value to existing clients so there's a big lever to pull there, so when you think about your big levers.

449

01:16:26.400 --> 01:16:35.220

Stephanie Bogan: And where you go from here, how are you organizing next year's plan around that is the next question so when you think about 2022.

450

01:16:35.610 --> 01:16:46.170

Stephanie Bogan: And sort of what the next leap is for you, whether it's hiring or building that system are you building that into have you built it into your calendar for a year, do you have a work plan for it.



451

01:16:47.160 --> 01:16:54.270

Stephanie Bogan: Right, if you look at Adams calendar he's got time for conferences it's got time for surgeries he's got time for projects at different places on his calendar.

452

01:16:54.750 --> 01:17:02.490

Stephanie Bogan: because those are things he's doing to make sure that time is available so remember if if you're joining us next year you'll get your welcome package your calendar and.

453

01:17:03.000 --> 01:17:15.150

Stephanie Bogan: Some other cool things will be on route, so you can use that and, if not right print one out go buy one and office depot but the goal is your vision cannot become a reality, unless you will align your actions with it.

454

01:17:15.780 --> 01:17:26.100

Stephanie Bogan: And if we just show up every day we start doing, we can do some really great things, but if we align it all the way through our plans to our strategies to our calendar to our model schedule.

455

01:17:26.490 --> 01:17:33.150

Stephanie Bogan: Then what you see is your time we really does start to align with the outcomes that you want to create so you heard some good things today.

456

01:17:33.480 --> 01:17:40.230

Stephanie Bogan: Right we've always talked about Monday is working on the business called that your CEO day right whether it's you or 15 people.

457

01:17:40.560 --> 01:17:51.750

Stephanie Bogan: Fridays I call them flexor free days right that you can take them to be free and go out if you're in growth mode you're working on a project, you can use them as FLEX days so that they're there and available for you.

458

01:17:52.470 --> 01:17:58.860

Stephanie Bogan: When you start to do this at the next level, for example, like the coaches and I and some of our other clients who really like.



459

01:17:59.280 --> 01:18:10.650

Stephanie Bogan: we're not scheduling just by weeks rescheduling by quarters right we're looking at we're speaking here we're doing this you're reporting podcasts here so for some of you that's also applicable, you can look at your schedule from a quarterly basis.

460

01:18:11.010 --> 01:18:20.340

Stephanie Bogan: But your schedule for the year, particularly for those of you with teams really mapping that out saying here's the plan for the year here's the here's the strategy we're going to follow and why.

461

01:18:20.730 --> 01:18:22.980

Stephanie Bogan: here's how that's reflected in the calendar.

462

01:18:23.910 --> 01:18:32.580

Stephanie Bogan: And here's how that's reflected in my schedule creates a lot of clarity and alignment between you and the team and the calendar, and those are the three variables that need to be aligned.

463

01:18:32.880 --> 01:18:42.690

Stephanie Bogan: for you to have agency over your time so just a reminder for all of you to be looking at your plans and your goals for next year and then making sure that you turn them into.

464

01:18:43.380 --> 01:18:53.940

Stephanie Bogan: Things that you can share next year is success stories again whether you're here or not is what's the work plan is it showing up in your calendar is showing up in your schedule, have you communicated it to your team.

465

01:18:54.510 --> 01:19:02.370

Stephanie Bogan: So I want you to write down one thing that you can do next, to make sure that that lever gets pulled in 2022.

466

01:19:05.220 --> 01:19:13.500

Stephanie Bogan: If you've already got people planning and project management and all of that in place, maybe it's something else if you don't maybe it's simply having the meeting with your team.

467

01:19:14.040 --> 01:19:24.330



Stephanie Bogan: or updating your calendar, but I want you I would love for you to have at least one thing from this call that you can take that next step on related to whatever the big lever, you want to pull next year is.

468

01:19:26.520 --> 01:19:34.470

Stephanie Bogan: Joseph doing team retreat in January done already, on calendar great tanya's raising minimum adding 15 more clients fabulous.

469

01:19:35.010 --> 01:19:51.240

Stephanie Bogan: When talking about that for a little bit so good progress, their schedule and respect the calendar Ryan, that is, like literally been I know i've been was on here I can't I don't know where your video has been Ben does such a good job of this truly I better, are you still there, those.

470

01:19:52.680 --> 01:19:55.560

Stephanie Bogan: depends video go I don't know if you're the if you're there you can jump in then.

471

01:19:55.890 --> 01:20:04.560

Stephanie Bogan: A huge part I think of what Ben has helped been really kind of create the growth rate, he has is just that clarity and focus I can't tell you what our coaches calls how many times have you said something if it's like.

472

01:20:04.590 --> 01:20:07.320

Stephanie Bogan: nope that's none of my agenda i'm not gonna do it like okay great.

473

01:20:07.830 --> 01:20:20.490

Stephanie Bogan: Right it's that level of focus, because when you were that committed to an outcome right when Adam got to the point where he was like I am going to make another hundred thousand dollars a year come hell or high water anything less is unacceptable.

474

01:20:21.660 --> 01:20:34.080

Stephanie Bogan: That commitment shows up and you'll find a way, so I want you to look at your calendar for next year with respect to this lever, the thing that you identified as the biggest one you have to pull and ask yourself what's the commitment.

475

01:20:34.470 --> 01:20:41.100



Stephanie Bogan: I need to make that needs to show up on a calendar, so that I can make sure that I am called to action, as I hit next year.

476

01:20:43.170 --> 01:20:49.200

Stephanie Bogan: Alright, Tom is going to calendar it but William you've already scheduled the calendar tanya raise your fees.

477

01:20:50.460 --> 01:20:57.510

Stephanie Bogan: Does anyone not have a big lever or a next step for next year, are you all primed and poised to hit the ground running in 2022.

478

01:21:00.060 --> 01:21:14.910

Stephanie Bogan: kids going to work on voice and then CEO I project and model calendar this week yeah The goal is to always hit the next year with your calendar for that year done Adam sent me here I don't know, is it a month ago, Adam probably Adam just.

479

01:21:15.570 --> 01:21:25.560

Adam Cmejla, CFP®: We had our strategic retreat with the beginning of December, and that gave us the month to plan ahead so that January we already know we're mapped out for January and done instead of using january's of planning.

480

01:21:26.610 --> 01:21:35.520

Stephanie Bogan: yeah great yeah So if you have not done that, yet that can be your holiday project is right print out the month of the year, go to office depot by your calendar.

481

01:21:35.910 --> 01:21:51.750

Stephanie Bogan: surges family time first always in my world right schedule your holidays, first and foremost, your Fridays if you're doing friday's all for every other if you want to read start to do, free and FLEX and move in that direction and then what conferences, do you want or need to attend.

482

01:21:52.770 --> 01:22:02.310

Stephanie Bogan: client surges and then that should leave the balance of your calendar fall and that's where you build the model schedule, so that you know you and your team know how you want to use your time in those weeks in between searches.



483

01:22:02.910 --> 01:22:11.610

Stephanie Bogan: You can block off marketing week to work on plans you can you know make every Tuesday coi day you can you know you're going to have time for client service in there.

484

01:22:11.850 --> 01:22:23.130

Stephanie Bogan: So that's where those calendars and schedules really come in at this point in the year as you're using them to turn that vision into a budget if you will you're turning it into a time budget, the same way that you do your business budgets.

485

01:22:25.320 --> 01:22:31.200

Stephanie Bogan: All right, christie's working on your financial house project Christie how's that coming we're going to get to see you soon.

486

01:22:35.820 --> 01:22:36.570

Stephanie Bogan: I know shy.

487

01:22:37.170 --> 01:22:38.100

Christy Raines: yeah no i'm here.

488

01:22:39.150 --> 01:22:39.420

Stephanie Bogan: Oh.

489

01:22:39.750 --> 01:22:40.890

Stephanie Bogan: Yes, I love it.

490

01:22:42.660 --> 01:22:47.160

Christy Raines: um yes it is coming, and the first step.

491

01:22:48.360 --> 01:22:49.380

Christy Raines: Is the value.

492

01:22:50.970 --> 01:22:59.220



Christy Raines: piece, which we you and I were chatting about on Dr yeah so i'm so I mean it's I literally dream about it so that's that's where that's.

493

01:23:00.510 --> 01:23:03.810

Stephanie Bogan: Where you guys, I mean many of you know right christy has this incredible.

494

01:23:03.870 --> 01:23:08.700

Stephanie Bogan: very, very, very extensive deliverables and for the last year or two she's been really like.

495

01:23:09.360 --> 01:23:12.060

Stephanie Bogan: How do we articulate this value without know.

496

01:23:12.270 --> 01:23:23.100

Stephanie Bogan: Not that those they won't be part of the process, and I think it was the brand boot camp earlier this summer I think she just like had the Aha moment came up with this idea of a financial house and I just got it designer working on it.

497

01:23:23.580 --> 01:23:31.530

Stephanie Bogan: Looking for family values so it's just going to be like this rapper that goes over what she's done so that that is the dashboard in the the article.

498

01:23:31.650 --> 01:23:32.490

Christy Raines: By yeah.

499

01:23:33.090 --> 01:23:34.290

Christy Raines: it's my one page plan.

500

01:23:34.680 --> 01:23:42.180

Stephanie Bogan: it's her version of the one page plan and, by the way, and we all know, Chris is doing great right that took about a year year is.

501

01:23:43.410 --> 01:23:44.460

Christy Raines: More than that yeah.



502

01:23:44.610 --> 01:23:45.000

yeah.

503

01:23:46.560 --> 01:23:52.530

Stephanie Bogan: You just understand that, like everybody doesn't hit whether it's this coaching program or any other that compared like.

504

01:23:52.860 --> 01:24:01.710

Stephanie Bogan: You don't all hit everything at the exact same time right you'll do something big you'll get that left you'll work on something for a little while and that's I think josh.

505

01:24:02.220 --> 01:24:07.350

Stephanie Bogan: We were talking about this with you just a minute ago it's it's an organic process right so christy got the vision.

506

01:24:07.650 --> 01:24:13.620

Stephanie Bogan: And now she's just consistently working in that direction without feeling like she's going to fall off a cliff if it's not done tomorrow.

507

01:24:14.160 --> 01:24:19.170

Stephanie Bogan: Which is a nice place to be in to be in a place where you can create space to create.

508

01:24:19.500 --> 01:24:28.650

Stephanie Bogan: meaningful progress without feeling like you have to move yourself off the edge of a cliff or else which I know Those are some of the voices that popped into her head sometimes so.

509

01:24:29.160 --> 01:24:35.940

Stephanie Bogan: it's about finding that flow right, I was talking with my husband last night about, you know as entrepreneurs, I had some client calls yesterday and.

510

01:24:36.150 --> 01:24:41.430

Stephanie Bogan: That sense of urgency that we always have like we have to battle really harder we're going to go over the edge of the falls.



511

01:24:41.940 --> 01:24:52.770

Stephanie Bogan: And what I hope you're hearing and all starting to experience more of is this is going to feel really uncomfortable for some of you, by the way the lazy river y'all y'all familiar with the lazy river.

512

01:24:54.000 --> 01:25:02.370

Stephanie Bogan: Right and then I know some of your brains like minded when that I created the idea in my head and I still argued with myself as soon as I thought lazy river, what did my brain do.

513

01:25:03.720 --> 01:25:10.230

Stephanie Bogan: I want you to think about old stuff old world I was like oh no lazy rivers or two like that's know now there's like a.

514

01:25:11.070 --> 01:25:23.760

Stephanie Bogan: tues to chilled out like we got to be on there, and I was like oh that's really that's really interesting that's the world trying to create right and moving incrementally in that direction, how do we keep our drive in our passion and our enthusiasm.

515

01:25:25.020 --> 01:25:36.600

Stephanie Bogan: And still be able to write flow with the river and make that progress, instead of feeling like we have to paddle upstream are going to go falling off the edge of the waterfall so as we create more and more of that space for ourselves.

516

01:25:36.930 --> 01:25:44.130

Stephanie Bogan: What I hope you're hearing and seeing and certainly experiencing is it creates more space, it creates more growth, it creates more happiness.

517

01:25:44.670 --> 01:25:57.930

Stephanie Bogan: And we're conditioned to do all the other things perfect in control and when we when we give ourselves a little bit more freedom as long as we're acting with clarity and commitment, then the good things tend to happen incrementally over time.

518

01:25:59.250 --> 01:26:08.610

Stephanie Bogan: So Christie good job on that I really, really can't wait to see it all right allison has changed his life, which means it's time for me to get to our survey results and winners alright.



519

01:26:09.240 --> 01:26:18.480

Stephanie Bogan: So you guys were kind enough to fill out the survey that we sent out in terms of how we did this year in totality I was really happy to read the results and i'll share some of the feedback that we got.

520

01:26:19.380 --> 01:26:27.420

Stephanie Bogan: This is the famous net promoter score question which is basically just how likely, are you to refer someone to this program based on your experience.

521

01:26:27.840 --> 01:26:38.940

Stephanie Bogan: If you can read all this tiny boxes what you would ultimately conclude is that we got a point one on a scale of 10 which is pretty much world class and net promoter land that makes us very happy.

522

01:26:39.630 --> 01:26:46.260

Stephanie Bogan: That does not mean, by the way, that we were perfect or right there's that way they're not places for us to get better.

523

01:26:46.650 --> 01:26:57.810

Stephanie Bogan: And they're, all in all 50% of you are, it was like 4948 points and why was it 49.2% of you basically half of you on a scale of one to 10 so that you were 10 likely.

524

01:26:58.260 --> 01:27:06.060

Stephanie Bogan: To refer someone which lets us know right that what we're doing here really does work, I think we had one person, give us a five and one a six.

525

01:27:06.690 --> 01:27:12.930

Stephanie Bogan: Just minor feedback, which was great But, all in all, like we did, really, really well this year and I want to.

526

01:27:13.320 --> 01:27:22.200

Stephanie Bogan: One thank the team for all of their hard work, because they really do a lot of the heavy lifting behind the scenes to make sure that you have the experience that you do, and I want to thank our coaches.



527

01:27:22.800 --> 01:27:29.550

Stephanie Bogan: Because without them this year would not have been possible and they've been here for you in different times and places and ways, and I know that you have all valued that.

528

01:27:30.090 --> 01:27:32.490

Stephanie Bogan: Based on the feedback that you shared with us and.

529

01:27:32.940 --> 01:27:41.520

Stephanie Bogan: I want to thank each of you, because the thing that makes this a coaching Community instead of just a coaching program is all of you and it's the connection.

530

01:27:41.850 --> 01:27:48.090

Stephanie Bogan: And the collaboration and the commitment that you have to your success and to everyone else's and I think that you're finding.

531

01:27:48.480 --> 01:27:55.920

Stephanie Bogan: The teamwork really does make the dream work, and we really can get there, better together than we can on our own so whether you're joining us next year, not remember.

532

01:27:56.160 --> 01:28:07.800

Stephanie Bogan: It coaching and community are two of the things that are really additive and edify us and elevate us so if you don't find them here, please find them somewhere, and if you are joining us next year we've talked a bit about it, but we have lots of.

533

01:28:09.030 --> 01:28:16.230

Stephanie Bogan: All the good stuff that you come to expect, but also some exciting and I think valuable changes, based on what we learn we have.

534

01:28:16.800 --> 01:28:21.150

Stephanie Bogan: broken out the masterminds so we're very excited about the changes there and as they've shared.

535

01:28:21.540 --> 01:28:29.400



Stephanie Bogan: we're adding more tribe talk tracks on personal and professional things we're adding the quarterly sessions around strategy and vision.

536

01:28:29.760 --> 01:28:38.130

Stephanie Bogan: And I and i'm wearing accountability pulling in what we've learned about how to connect with you in a group program and still make it feel really individual and personal.

537

01:28:38.520 --> 01:28:48.990

Stephanie Bogan: So I think you'll see some really positive learning by in the systems and structures that we put in place next year for an even more engaging experience so be on the lookout for that all right allison are you ready.

538

01:28:50.550 --> 01:28:56.310

Stephanie Bogan: Oh, I should say number one challenge Lo and behold big surprise overwhelm right hey i've got a lot to do.

539

01:28:56.670 --> 01:29:05.220

Stephanie Bogan: How do I get a little bit more clarity and focus on that so as we've talked about will give you a map of the program and a personal path to hike your way through it.

540

01:29:05.640 --> 01:29:14.220

Stephanie Bogan: And next year, so we're really excited about that and the things that we learned our that you all really love the program and they're absolutely I think.

541

01:29:14.820 --> 01:29:24.270

Stephanie Bogan: With some of the other feedback, so one of the I think the other big piece of feedback we should say big, I think it was one or two people but population size, I think it all still matters.

542

01:29:24.840 --> 01:29:28.320

Stephanie Bogan: Is the virtual retreat so September of code year.

543

01:29:28.740 --> 01:29:37.770

Stephanie Bogan: We did the whole retreat virtually because it was code year and that's how we had to do the entire retreat and this year we had virtual tracks because they're really in person retreats.



544

01:29:38.130 --> 01:29:45.060

Stephanie Bogan: That we're making available virtually and I think one or two of you noted that it was a different experience and it is very much different experience.

545

01:29:45.450 --> 01:29:57.720

Stephanie Bogan: um when we do them in person, the focus is on doing them in person, and we are kind of adding to the the virtual experience next year because we'll have any half of the group will be virtual so we have some great learning from that experience.

546

01:29:58.230 --> 01:30:03.390

Stephanie Bogan: So we'll be bringing that in as well and honestly we didn't have really a lot of negative feedback.

547

01:30:04.440 --> 01:30:14.250

Stephanie Bogan: We had a lot of really positive feedback lots of great stories and shares, I think one person said that it felt a little Oregon disorganized at times and I was like probably.

548

01:30:14.940 --> 01:30:27.450

Stephanie Bogan: Probably plus on this day um, but I think, all in all, you guys have helped make this a really incredible year, certainly for us, but also for your community, and I want to give you guys all the big round of applause for that, because without you.

549

01:30:27.840 --> 01:30:36.660

Stephanie Bogan: The limitless experience would not be limitless it would be different, and you really do make that possible all right allison we've got some yetis and a learning lab to.

550

01:30:36.660 --> 01:30:37.650

Stephanie Bogan: give away to that.

551

01:30:37.890 --> 01:30:46.290

Limitless Adviser: Yes, we do Okay, and I was thinking, I will have Adam and tanya pick a number between one and 59.

552

01:30:47.940 --> 01:30:49.140



Limitless Adviser: want to go first Adam.

553

01:30:50.670 --> 01:30:56.430

Limitless Adviser: 3636 Okay, this will be our winner of the yeti.

554

01:30:57.840 --> 01:31:03.240

Limitless Adviser: or shift yeti okay let's see i'm going to take you on the call.

555

01:31:04.950 --> 01:31:12.510

Limitless Adviser: Real quick oh Okay, not on the call, so this will be slightly anti climactic but Nathan hold.

556

01:31:12.930 --> 01:31:14.130

Stephanie Bogan: It Jenny.

557

01:31:16.410 --> 01:31:19.140

Stephanie Bogan: Okay, like the raffles like you have to be here to win.

558

01:31:19.440 --> 01:31:20.550

Adam Cmejla, CFP®: must be present to win.

559

01:31:22.320 --> 01:31:23.400

Stephanie Bogan: Now I will give him one and.

560

01:31:23.970 --> 01:31:24.750

Stephanie Bogan: draw another one.

561

01:31:26.040 --> 01:31:29.550

Limitless Adviser: Okay, all right pick one more will be given to somebody on.

562

01:31:29.970 --> 01:31:31.890

Stephanie Bogan: This is extra so if you're not here you don't want it.



563

01:31:33.180 --> 01:31:35.670

Stephanie Bogan: Okay, you must be present to win this one.

564

01:31:35.970 --> 01:31:36.330

Adam Cmejla, CFP®: don't mean it.

565

01:31:37.740 --> 01:31:39.360

Limitless Adviser: will have tanya do the learning lab.

566

01:31:40.290 --> 01:31:42.450

Limitless Adviser: Nine okay.

567

01:31:44.130 --> 01:31:47.310

Limitless Adviser: let's see let's see oh merge.

568

01:31:50.370 --> 01:31:56.190

Limitless Adviser: awesome you're even here okay and tanya do you want to pick our winner for the learning lab.

569

01:31:57.060 --> 01:31:57.870

17.

570

01:31:59.010 --> 01:32:00.360

Limitless Adviser: Good number okay.

571

01:32:00.930 --> 01:32:02.970

Stephanie Bogan: She didn't even hesitate she just went for it.

572

01:32:03.720 --> 01:32:04.290

Limitless Adviser: What do we think.



573

01:32:04.710 --> 01:32:06.810

Limitless Adviser: Does this person need to be present to win.

574

01:32:07.530 --> 01:32:09.090

Tanya Nichols: Yes, absolutely.

575

01:32:09.240 --> 01:32:12.000

Limitless Adviser: yeah Okay, before I announce it, let me.

576

01:32:14.820 --> 01:32:17.700

Limitless Adviser: Yes, Okay, Chris Hansen.

577

01:32:19.470 --> 01:32:20.580

Stephanie Bogan: See you right there that work.

578

01:32:20.580 --> 01:32:30.960

Stephanie Bogan: yeah congratulations right you guys will get your yet yetis and you're learning lab
Chris we won't mail you a learning lab you're gonna have to mail yourself to it, but nonetheless it'll so.

579

01:32:33.240 --> 01:32:39.720

Stephanie Bogan: All right, we have eight minutes left, and I believe that I am out of agenda is that
correct ellison I don't think there's any more slides here.

580

01:32:39.780 --> 01:32:41.100

Limitless Adviser: That is correct, we covered a.

581

01:32:41.100 --> 01:32:42.900

Stephanie Bogan: whole year to get early, but we did it.

582

01:32:45.120 --> 01:32:59.010

Stephanie Bogan: All right, well, this is your call and we have eight minutes left why don't you guys open
up a little bit and i'm gonna just call on a few of you to ask you what your focus is for next year, and any



inspiring thoughts, you want to share with your peers, as we wrap up.

583

01:33:00.360 --> 01:33:01.770

Stephanie Bogan: gave Nelson you look.

584

01:33:03.300 --> 01:33:04.230

Stephanie Bogan: On your mind today.

585

01:33:04.950 --> 01:33:14.220

Gabe Nelson: Ah let's see two things move the needle next year is going to be bringing on a virtual OPS person to pretty much take even more off of my plate.

586

01:33:14.850 --> 01:33:30.180

Gabe Nelson: and the next one, which is actually a little cooler is tomorrow is my 50th birthday and my wife through a amazing surprise birthday party for me on Saturday so totally surprised me it was awesome so.

587

01:33:30.360 --> 01:33:33.180

Stephanie Bogan: yeah those are the best experiences okay.

588

01:33:33.660 --> 01:33:34.920

Gabe Nelson: Yes, he was awesome.

589

01:33:35.370 --> 01:33:43.800

Stephanie Bogan: When my husband turned 50 I had these big poster boards, you know, in the black done and it was what was it like NIF with nifty nifty damon is 50 years.

590

01:33:46.800 --> 01:33:50.250

Stephanie Bogan: He was like really did you have to publicize and put them all over the rest.

591

01:33:51.480 --> 01:33:56.370

Stephanie Bogan: So we needed, yes, yes, I did Thank you so much, yes, embracing a break.



592

01:33:56.790 --> 01:33:57.300

Gabe Nelson: Oh yeah.

593

01:33:57.360 --> 01:33:57.780

Gabe Nelson: yeah I.

594

01:33:58.980 --> 01:34:03.180

Stephanie Bogan: Like feels bad you strike me as like a lover and liver of life, I think you and I share that.

595

01:34:03.810 --> 01:34:05.070

Gabe Nelson: Oh yeah yep.

596

01:34:05.250 --> 01:34:12.690

Stephanie Bogan: Thank you awesome all right let's see dance theater you're in your Sam the cat what's going on with you what's your focus for next year, sir.

597

01:34:14.490 --> 01:34:15.810

Dan Suiter: Hello Hello jack.

598

01:34:17.040 --> 01:34:19.260

Dan Suiter: i'm sorry, my name is Danny the else.

599

01:34:19.530 --> 01:34:20.160

Stephanie Bogan: Anything else.

600

01:34:20.190 --> 01:34:24.840

Dan Suiter: yeah I was a human raised by else but you might know my older brother Steve.

601

01:34:26.970 --> 01:34:28.320

Dan Suiter: Okay joke for the day.

602



01:34:29.340 --> 01:34:29.940

Stephanie Bogan: I got it.

603

01:34:30.390 --> 01:34:42.210

Dan Suiter: I actually We made it, I had to make a decision, I think, as a grownup decision as much as I love limbless and like to be involved in everything I decided to do the legacy, because we are twofold moving to ra leaving the bd by q2.

604

01:34:43.200 --> 01:34:47.760

Dan Suiter: And yeah there's my fellow X Cambridge patriots they're applauding so.

605

01:34:48.990 --> 01:34:54.210

Dan Suiter: And then, on top of that, we have a part time admin we hired this year she's actually out on maternity leave right now.

606

01:34:54.600 --> 01:35:06.810

Dan Suiter: But early next year, bringing her into the fold and training her up she's eager to get involved so i'm looking forward to handing off to her as much as possible, because those two things should keep me really busy going into the first year.

607

01:35:07.290 --> 01:35:11.820

Stephanie Bogan: yeah I was just we're gonna have to have you do that stand up comedy with Ben will have to have you guys do a.

608

01:35:12.750 --> 01:35:23.550

Stephanie Bogan: session together yeah For those of you that have brought someone on virtually part time writer in any capacity, what you'll notice is when you get clear on the leverage that they can create.

609

01:35:23.910 --> 01:35:32.850

Stephanie Bogan: And then you find people that work that you can shift from that I don't want anybody to like ooh, what can I get rid of you heard that a couple of times like what can I gave like what can I get rid of next.

610

01:35:33.120 --> 01:35:41.220

Stephanie Bogan: What can I get rid of next, and when you run across that person and there's a



breakdown you learn that there's a difference between a breakdown with the person.

611

01:35:41.610 --> 01:35:51.420

Stephanie Bogan: And a breakdown in the role and that's what happens, a lot of time is, we have some experience early on and we're like I don't like managing people it's easier to do it myself right filling your story here.

612

01:35:51.810 --> 01:36:00.630

Stephanie Bogan: But that means that that moment in time, that person that relationship your leadership and management at that time that that all came together to create that and.

613

01:36:01.080 --> 01:36:08.550

Stephanie Bogan: When you get it right, then you get to this place, we are like this is not like ask Adam like this is not on my list, this is not on my list this.

614

01:36:09.180 --> 01:36:14.610

Stephanie Bogan: Michael gets us that I do like everyone's like, why did you hire so many people, and he was like I got so excited.

615

01:36:14.910 --> 01:36:24.270

Stephanie Bogan: about what I could do that I just kept growing revenue, so that I can hire the people to offload the things like that's the business plan is just keep hiring.

616

01:36:24.630 --> 01:36:35.790

Stephanie Bogan: To get everything off except the two or three things that we ultimately want to do as rate senior advisors or founders or growth officers are kind of whatever we choose as a primary role or roles.

617

01:36:36.510 --> 01:36:47.880

Stephanie Bogan: So leverage is a wonderful thing when you create it, it also requires trust it requires communication it requires right, you know all those conversations and systems and.

618

01:36:48.270 --> 01:36:57.240

Stephanie Bogan: And that there can be lots of breakdowns in that part of the process, and when we when we don't address those and we experience it sometimes we tell ourselves it's just easier to do it



ourselves.

619

01:36:57.930 --> 01:37:06.660

Stephanie Bogan: And it is when that's the way that we do it so as you look at next year the invitation is to ask yourself where can I create more leverage for myself whether it's with people.

620

01:37:07.050 --> 01:37:19.110

Stephanie Bogan: Whether it's in process, whether it's in your platforms, or very much like Neil was talking is it in your packaging and your purpose and really getting clear on your vision and voice and using that to elevate your success next year.

621

01:37:22.080 --> 01:37:29.340

Stephanie Bogan: And there is, I would say no shortage of opportunity for all of you over the course of the next and coming years, because the whole world is now.

622

01:37:29.670 --> 01:37:39.180

Stephanie Bogan: tuned into financial planning and wealth management and I like to call it the rise of advice and everyone is you know with means and now there's an entire marketplace.

623

01:37:39.810 --> 01:37:50.550

Stephanie Bogan: And the means technologically and more and more firms and moving into the space that we can go down market sideways market up market right there's just an incredible amount of opportunity for all of you.

624

01:37:50.970 --> 01:37:58.140

Stephanie Bogan: As your face 2022 and the years after it so that's just all about people process and platform show up with a great message and a good vision.

625

01:37:58.620 --> 01:38:05.550

Stephanie Bogan: And you have a good delivery system, and you will be just fine so level the comments that I see creating jobs is awesome.

626

01:38:06.450 --> 01:38:16.920

Stephanie Bogan: josh has got some comments yeah we've got a resource list jail, if you want resources there's total office and number of firms i'm happy to that's in the library, if you want to, if you want to



access that as well.

627

01:38:17.520 --> 01:38:27.570

Stephanie Bogan: All right, ladies and gentlemen, we have three minutes left, and with that I think we're going to wrap our call if you guys have any questions or comments anything anyone wants to share before we wrap 2021.

628

01:38:28.590 --> 01:38:33.570

Liz Hand, CFP®: stephanie do you take on a word of the year and, if so, what are you anticipating for 2022.

629

01:38:33.960 --> 01:38:37.830

Stephanie Bogan: Oh well, I would say that the word for this year was probably agency.

630

01:38:38.490 --> 01:38:54.540

Stephanie Bogan: Thank tiffany for that, I think we were having a conversation at some point in the year and that came up and it's been a really powerful award i'm theme for next year I don't have well in general I don't have a word thing, but I will you know I take it back I do, I actually do equanimity.

631

01:38:56.850 --> 01:38:58.530

Stephanie Bogan: Does anybody know what equanimity means.

632

01:39:00.210 --> 01:39:01.380

Stephanie Bogan: Anybody wonders for me.

633

01:39:01.770 --> 01:39:02.910

Stephanie Bogan: Excellent Emily it's actually.

634

01:39:04.500 --> 01:39:04.950

Stephanie Bogan: i'm sorry.

635

01:39:06.270 --> 01:39:07.860

John Chitaley: clouded a clear mind.



636

01:39:08.190 --> 01:39:16.950

Stephanie Bogan: clearness of by an acronym it is actually a it's a it's a regular word but they use it a lot of meditation and it's about having a state of being with non reaction.

637

01:39:18.180 --> 01:39:20.310

Stephanie Bogan: When you just sit in that space and you're like.

638

01:39:21.870 --> 01:39:22.350

Stephanie Bogan: chill.

639

01:39:23.670 --> 01:39:29.340

Stephanie Bogan: The dogs barking the kids are screaming and you're still I call it mind like water.

640

01:39:30.900 --> 01:39:41.280

Stephanie Bogan: Which is when you think about like we live in a world of reaction we live on a planet, that is hurling through space at some unknown sermons on unknown some incredible speed.

641

01:39:41.610 --> 01:39:50.070

Stephanie Bogan: we're spinning around we're doing all of these things, all of the time and, ultimately, all we ever run in the end is just to feel better.

642

01:39:50.700 --> 01:39:59.820

Stephanie Bogan: Just to feel better and so aqua anonymity is this idea that we can sit in a space without reacting to it.

643

01:40:00.450 --> 01:40:14.130

Stephanie Bogan: And so my version of that is mine like water, because I like analogies and stories they help me remember things in mind like water is, if you imagine this world of chaos that we live in you're in an ocean, our goal is for that lake let's use the lake to be still on top.

644

01:40:15.600 --> 01:40:26.130

Stephanie Bogan: It still and life happens someone picks up a giant boulder and they throw it in your lake but Andrea when I throw a giant boulder in the lake what happens right away, and then what happens after.



645

01:40:30.180 --> 01:40:31.170

Stephanie Bogan: What happens right away.

646

01:40:31.800 --> 01:40:33.180

Stephanie Bogan: Big splash but.

647

01:40:33.660 --> 01:40:34.530

Stephanie Bogan: What happens.

648

01:40:34.890 --> 01:40:41.910

Stephanie Bogan: within seconds, if no other force is involved, what happens within a fraction of a second or seconds.

649

01:40:42.570 --> 01:40:44.100

andrew palomo: creates waves ripples.

650

01:40:45.270 --> 01:40:56.490

Stephanie Bogan: My like water right goes back to status because water always seeks its own level and That to me is what equanimity is about Liz it's about how do I.

651

01:40:57.270 --> 01:41:12.180

Stephanie Bogan: How do I find my level so we're all whether you realize it or not, conditioned to a certain energy level masculine feminine survival fear scarcity or right abundance possibility but you know those differences and feelings.

652

01:41:12.690 --> 01:41:22.530

Stephanie Bogan: And so equanimity is really understanding that if the dogs barking or the screaming or the market tanked or client got pissed off and fired you in a nasty email, and you have no idea why.

653

01:41:23.700 --> 01:41:29.250

Stephanie Bogan: Allow allow the splash that's human but it takes, we talked about this in one of our calls recently.



654

01:41:29.940 --> 01:41:35.370

Stephanie Bogan: emotions are just energy moving through your body and it typically takes according to the research about 90 seconds.

655

01:41:36.030 --> 01:41:45.600

Stephanie Bogan: Unless you latch on to it, which is what we do when we have stories about things so that client fired me because you know he realized that i'm overwhelmed and i'm in over my head no my other clients are going to figure like.

656

01:41:45.960 --> 01:41:52.830

Stephanie Bogan: Those are the stories that kick in the create the reaction and then what we do is we instead of letting the rock just do its thing.

657

01:41:53.880 --> 01:42:03.600

Stephanie Bogan: Right and find our level who am I, how do I want to respond to this okay this cleanse obviously unhappy i'd like to find out why, if i've messed up i'll do the best that I can to fix it if they leave.

658

01:42:03.990 --> 01:42:09.540

Stephanie Bogan: Well then, they leave and they're not very forgiving I don't want clients that aren't forgiving as long as they know my intent is good, I should like.

659

01:42:10.020 --> 01:42:23.220

Stephanie Bogan: That seeking your own level and then you're coming from a place of non reaction like notice the difference where you're like well it's a bummer that that client feels that way don't know why going to need to figure it out there's something I can learn I can learn but.

660

01:42:24.540 --> 01:42:33.690

Stephanie Bogan: that's very different than what we tend to do, which is why did that happen, and then the stories in our head and we start spending, we got to figure it out and we talked to everybody, we tell her husband we tell it we do.

661

01:42:34.050 --> 01:42:40.680

Stephanie Bogan: And all we're doing is throwing rocks into the pond and keeping the boat and acronyms at Liz is.



662

01:42:42.000 --> 01:42:54.150

Stephanie Bogan: stillness it's the ability to to own your space your mind your body your being in a way that you can, and that is john is absolutely right equanimity if you get all the way down to it, is about clarity.

663

01:42:54.870 --> 01:43:04.800

Stephanie Bogan: When you are holy and utter aligned in mind and body, it creates a resonance you've all felt it we like to call it flow and when you are in flow state you feel freaking incredible.

664

01:43:05.190 --> 01:43:09.780

Stephanie Bogan: You can do anything you can be anything it's a state of expansion.

665

01:43:10.200 --> 01:43:23.040

Stephanie Bogan: And we can't step into that space on our own more often if we can't handle if we can't create equanimity for ourselves, because then we're in a state of constant reaction constant judging constant bracing.

666

01:43:23.490 --> 01:43:28.800

Stephanie Bogan: what's going to happen, I have to prepare for it, I have to worry about it, I have to stress about it, I have to strive for it.

667

01:43:29.340 --> 01:43:40.680

Stephanie Bogan: And when we do that does it service like what's our energy around that do we feel good are we doing it from a place of abundance and inspired action and inspiration because it's really aligned what we want to create for ourselves.

668

01:43:41.370 --> 01:43:52.950

Stephanie Bogan: Are we doing it because we're in a state of reaction and we're just conditioned to react and tell ourselves stories and beyond the hamster wheel, and when you get those moments of just pause and that's all we're trying to do here for slivers of time.

669

01:43:53.460 --> 01:44:01.380

Stephanie Bogan: is to get Neil to a place where he can go i've heard this enough times I get it this vision thing really matters okay i'm going to do that.



670

01:44:02.550 --> 01:44:07.050

Stephanie Bogan: And then, when you do that thing you're like holy crap they were not joking it really does work.

671

01:44:07.830 --> 01:44:17.430

Stephanie Bogan: All right, i'm going to do the next thing and then the next thing and that builds your confidence that's how you move from that crisis of confidence to really standing and owning our power.

672

01:44:17.970 --> 01:44:22.680

Stephanie Bogan: If we can't seek our own level, we can never get out of a state of reaction.

673

01:44:23.160 --> 01:44:32.250

Stephanie Bogan: or at least not for long enough to make meaningful change so if you are one of those handful of people that struggle still or procrastinator feels overwhelmed.

674

01:44:32.760 --> 01:44:40.830

Stephanie Bogan: I absolutely know that those are things that we, as a coaching program can and want to and will continuously try to improve on.

675

01:44:41.370 --> 01:44:52.350

Stephanie Bogan: And that doesn't no way, shape or form change the fact that it's all about how each of you shows up and commits and takes action based on the environment and the experience in the space that we create.

676

01:44:52.740 --> 01:45:02.220

Stephanie Bogan: And if we can't seek our level when we get into that state of reaction and we feel overwhelmed or you know we disengage because something isn't working or we're just too busy then.

677

01:45:02.730 --> 01:45:11.130

Stephanie Bogan: We don't have agency over our lives or experiences or outcomes and we spend our hours and our day spinning and it's Friday we're just happy to be done and.

678

01:45:11.460 --> 01:45:19.590



Stephanie Bogan: Sit down, you know and it doesn't mean that our lives aren't good but it's the quality that we're talking about that's why you're all here, you can go lots of places to make more money.

679

01:45:20.250 --> 01:45:31.650

Stephanie Bogan: But can we find a way to make more money while making more meeting for ourselves and our families and our clients and I think that to me is what the limitless experience is about, and to do that.

680

01:45:33.030 --> 01:45:43.290

Stephanie Bogan: gotta be able to find her level, and when we find that level is then we can take agency, then we can apply discernment, then we can execute with commitment and ferocity.

681

01:45:43.740 --> 01:45:54.450

Stephanie Bogan: and inspiration and stuff gets done there's no push and pull intention and that's what we're all working together to create a space for that background noise parse and it starts with.

682

01:45:55.140 --> 01:46:00.870

Stephanie Bogan: equanimity can we seek our own level, and if you're joining us next year Lo and behold, this on the agenda we're going to talk.

683

01:46:02.190 --> 01:46:08.160

Stephanie Bogan: So stay tuned and if you don't like that you should join us next year.

684

01:46:08.790 --> 01:46:17.790

Stephanie Bogan: We are incorporating into the tribe talks more of those micro conversations you know someone on breathing someone on health and fitness someone on parenting.

685

01:46:18.330 --> 01:46:29.940

Stephanie Bogan: More technical stuff right digital intact, but just so we have those places to go to have kind of those other conversations that are that we just can't possibly put any more into the structured agenda, if you will, but.

686

01:46:30.240 --> 01:46:36.180

Stephanie Bogan: that's all the stuff that fills in around the edges and really edifices and creates more Community so you'll see more of that next year as well.



687

01:46:37.320 --> 01:46:45.510

Stephanie Bogan: Right, we are right on the dot and I need to let you all go and wish you a fabulous holiday season, whatever you may be celebrating this year I.

688

01:46:45.870 --> 01:46:53.550

Stephanie Bogan: The coaches and the limitless team all wish you a wonderful holiday season, we are so touched and honored that you've chosen to spend your time.

689

01:46:53.940 --> 01:47:07.290

Stephanie Bogan: With us this year and I know that we all hope that you've had an incredible experience and that you use it to remember that the only limits, you have are the ones that you place on your loves yourself, so you will always be a part of the no limit nation.

690

01:47:08.190 --> 01:47:12.750

Stephanie Bogan: Call it now no limit nation came to me this weekend, because, like it.

691

01:47:14.550 --> 01:47:25.080

Stephanie Bogan: Like it the elimination all right, you guys, if you have any questions for us, we are here for the balance of this week, please feel free to send those off to the inbox other than that we will be enjoying the holiday.

692

01:47:25.440 --> 01:47:33.270

Stephanie Bogan: Allowing the team to get rested and renewed and trudging up for what we are sure is going to be an incredible next year and, as they said whether you were joining us or not.

693

01:47:33.570 --> 01:47:42.990

Stephanie Bogan: They certainly hope that what you've learned this year will help make next year, your best year ever with that Thank you and remember that your life is now in session have a great night.

