

WORKBOOK:

CREATING CLARITY

When your vision is clear,
your decisions are easy.



LIMITLESS

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THE IMPORTANCE OF CLARITY

When you decide to take a trip, it isn't for the destination; it's for the experience you want to have when you arrive.

Just as you wouldn't get in the car without a destination, you won't create better outcomes without first defining and deciding on what you will create.

This is a thinking exercise to ground you in your purpose - the fuel that drives your plans forward.

This exercise will disrupt you and challenge your conditioned thinking with the goal of preparing you for the Vision & Goals lessons, where you will define your version of The 5 Freedoms of Limitless Advisors.



FREEDOM 1

Work with purpose, on your terms



FREEDOM 2

Do work that you love



FREEDOM 3

Work with people you truly enjoy



FREEDOM 4

Experience all the financial success you desire



FREEDOM 5

Live a life of happiness, fulfillment and contribution

Simply put, we're asking you to reflect on the most important question of all: *What business and life do you want to create?*



HOW TO USE

While it may feel philosophical, this is a practical exercise to ground you in the outcomes you want to create for yourself.

It's simple, but don't mistake simple for easy.

- Set aside 1 hour of time in a quiet, comfortable place.
- Start in a 'feel-good' state. Run, walk, lift, meditate, just feel good.
- Make a mental note you've been granted permission to set aside all negative thinking, or doubts about how, what if, or whether you're worth it.
- Acknowledge your resistance. When the voices in your head cry out, write down what they say in the margins, and leave them there. We'll deal with them later.
- This is a mental warm-up. You're not committing to anything, so consider this your possibility playground.
- Bring your "All-Fun/No Fear" attitude.

THE WORLD'S BEST (HARDEST) THANK YOU LETTER

Stephy Shot

**You
don't
fail,
you win
or you
learn.**

Before taking the next roadtrip, it's important to clean out the car and make sure to get all the junk out of the trunk. Like cars, we carry around junk we don't need and hold onto things that don't serve us - in ways that can seriously alter the quality of our ride.

Everything you experience is a lesson. The parts of your experience you want to throw on the cutting room floor are where your learning and growth hide.

One of our favorite ways to close out the past, extract maximum learning and clear the way for a positive future is to write a personal Thank You Letter to last year as you begin the next.

This exercise always spurs a reaction. First, if we're being honest, it seems silly. Second, why would you want to thank the people and problems that plagued you?

You cannot reach for what's new if you're busy holding onto what's old. And you can't turn mistakes into milestones if you aren't willing to learn from them.

Do not shrink from these lessons, seek them out. They are your greatest teachers.

It's a simple, even silly exercise, that will set you up for greater success in the coming year.

If silly means more successful, we'll take two please. How about you?

HOW DOES IT WORK?

You write a Thank You Letter to (Last Year) using the following steps:

- On a lined piece of paper, write out every person, problem or situation that challenged you last year (or in your past).
- Next, challenge yourself to find and write down the real learning from the experience.
- Now, write a paragraph to each challenge thanking it for the lesson.
- After each paragraph, reflect on the lesson until you feel genuine gratitude for it.
- Complete the letter by noting the lessons learned, the value they hold and how you will use them in the future.
- Keep your letter(s) to reflect on in future years.



CHANGE

WHEN YOUR VISION IS CLEAR, YOUR DECISIONS ARE EASY

CREATING A NEW LEVEL OF SUCCESS STARTS BY BEING HONEST WITH YOURSELF ABOUT WHERE YOU ARE, AND WHY.

In this section, you'll take an honest assessment of how you are experiencing your business and life.

This is where you see things for what they are, not for what you want them to be.

Perform your assessments without judgment. The exercise is simply intended to pinpoint your location on the map to your Big Why.

Next, you'll start putting form to your goals by identifying the milestones by which you'll measure your progress.

Finally, you'll write your Success Story. This is the story you want us to be sharing 12 months from now to celebrate your commitment to your Big Why and the incredible progress you've made.

(Hint, you'll be seeing this throughout the year, so make it count.)

PLAN

YOUR 3-YEAR MILESTONES

Let's start by getting clear on where you are by gathering key data about your practice.

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3-YEAR VISION EXERCISE

YOUR BEST LIFE: THE SHORT STORY

Sit down in a quiet place and give yourself permission to envision the best version of your life you can imagine. Envision your ideal day, just as you'd like it to happen. Imagine your days as you'd love to experience them. Ponder on the work you do that is energy-creating and has you bounding into the office each day. Imagine the quality of relationships you enjoy, and how you feel in them. Get clear on how you'd love to live your life, what experience you want to have and the outcomes you want to achieve.

Next, complete the exercise below as simply and clearly as possible.

| PERSONAL | OUTCOMES Your ultimate destination | EXPERIENCES What you want along the way | GOALS Your milestones to get there |
|---------------|---------------------------------------|--|---------------------------------------|
| Health | | | |
| Emotional | | | |
| Spiritual | | | |
| Work/Career | | | |
| Finance | | | |
| Relationships | | | |
| Recreation | | | |
| Impact | | | |
| Other | | | |



WHAT'S NEXT

With these insights as your foundation, you'll engage in the Vision and Goals lesson to bring clarity and concrete goals to your vision.



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