

A woman with dark curly hair is shown in profile, looking out a window. She is wearing a white lace top. The background is a brick wall. A teal overlay with white dots covers the left side of the image.

LIMITLESS LIFESTYLE CLASS OF 2022

KICK-OFF
JANUARY 10, 2022



YOU'RE HERE TO LEARN HOW TO

BUILD A \$1M PRACTICE & TAKE OFF 100* DAYS YEAR

FASTER, BETTER AND FUNNER THAN DOING IT ON YOUR OWN!

*IF 100 DAYS FREAKS YOU OUT:
IT'S JUST FRIDAYS OFF & 12 WEEKS VACATION OR 1 WEEK OFF PER MONTH

LIMITLESS

MEET YOUR LIMITLESS ADVISORS



STEPHANIE BOGAN
Chief Possibility Officer

ADAM CMEJLA
Integrated Planning & Wealth



TIFFANY CHARLES
Destiny Capital



JARROD MUSICK
Destiny Capital



LIMITLESS GUEST FACULTY



MICHAEL KITCES
Kitces.com, Limitless Faculty



LIMITLESS ALUMNI



CARL RICHARDS
Behavior Gap, Limitless Faculty

MEET THE TEAM

THAT SUPPORTS YOUR DREAM

ALLISON FOULK
Program Manager



LISA VANDER
Engagement Manager



KATHRYN WALLER
Program Coordinator



LEONA ABRAHAO
Advisor Services



TEAMWORK MAKES THE DREAM WORK

Living a Life Without Limits

STEPHANIE'S STORY



FREEDOM 1:
Live with purpose, on your terms



FREEDOM 2:
Doing work you love



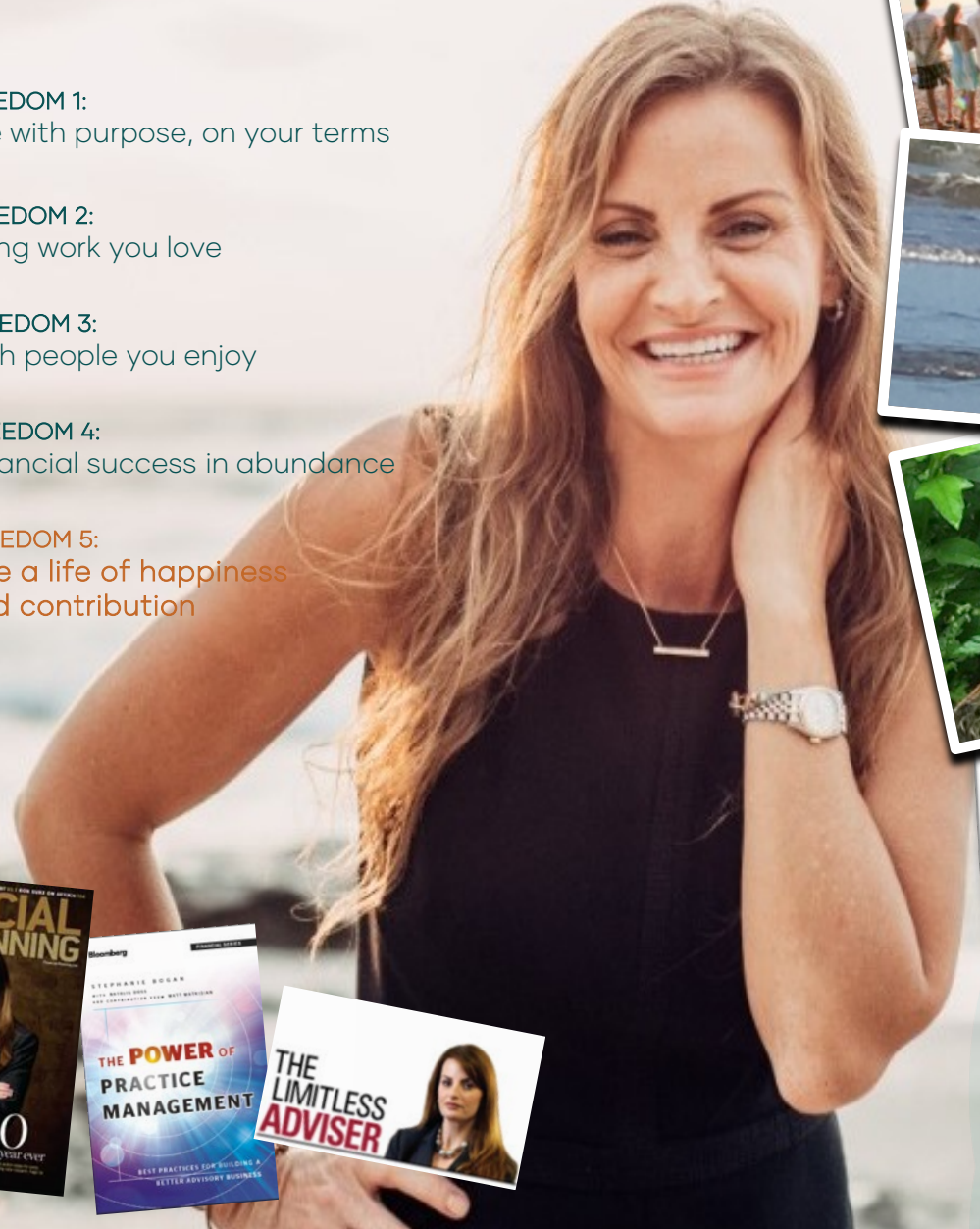
FREEDOM 3:
With people you enjoy



FREEDOM 4:
Financial success in abundance



FREEDOM 5:
Live a life of happiness and contribution



1996
FOUNDED QUANTUVIS CONSULTING

2008
SOLD TO GENWOTH
FORTUNE 200 EXEC TEAM

2012-2014
UNITED CAPITAL
BUILT ADVICE MODEL
& PRACTICE MODEL

2014
RETIRED TO BEACH IN COSTA RICA

2018
UN-RETIRED PART-TIME
FOUNDED LIMITLESS ADVISOR

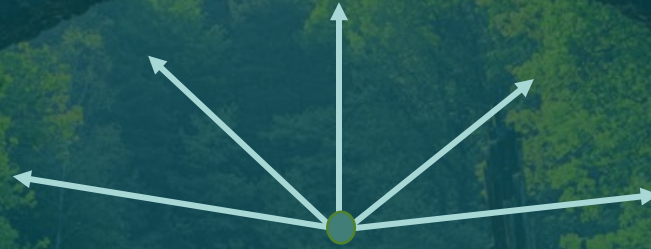
LIVING A LIMITLESS LIFE
Run 7-figure firm in 25 hours week
Combined businesses \$18M year
Sea & Slopes Life: Costa Rica & Park City



WHERE YOU ARE NOW
the experience you've created



\$1M+ PRACTICE &
TIME & FREEDOM TO ENJOY IT
the experience you want to create



WHAT YOU'RE REALLY HERE FOR
proven practices and coaching that help you bridge the behavior gap

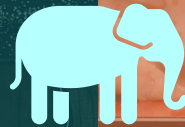
The Four Modes of Mastery

MINDSET
MAPPING
METHODS
MOMENTUM





DONT GET
OVERWHELMED
BY GLUTTONY



DO GET
ORGANIZED
AND GET TO WORK

"When your vision is clear, your decisions are easy." -STEPHANIE

Your LIMITLESS Learning Path



SHIFTS

1 ELEVATE your Thinking

SHIFTS

2 DEFINE your Model Practice

SHIFTS

3 TAKE AGENCY over your Time

SHIFTS

4 COMMUNICATE your Value

SHIFTS

5 TELL your Story

SHIFTS

6 STAFFING for Success

SHIFTS

7 DELIVER Specialized Value at Scale

SHIFTS

8 GEAR UP for Growth

SHIFTS

9 PLANNING & Performance

LIMITLESS LESSON PATHS

- 1
- The Science of Success
 - Self-Talk for Success
 - Overcoming Overwhelm
 - Relationship to Money

- 2
- My Model Practice
 - Your Vision for Success
 - Finding Your Fee Model
 - Nailing Your Niche
 - Strategic Planning

- 3
- Taking Control of Your Time
 - Client Meeting Surges
 - High-Performance Happiness
 - Managing your Energy

- 4
- Bridging the Behavior Gap
 - One-Page Financial Plan
 - Amazing First Meeting
 - Model Meetings

- 5
- Telling Your Story
 - Storytelling as Your Superpower
 - No Stress Prospect Process
 - Your Unique Value Proposition

- 6
- Rock Star Right Hand
 - Building & Managing Teams
 - Hiring & Training
 - Performance Management
 - Compensation Planning

- 7
- Building Your Bionic Engine
 - The Power of FinTech You Have
 - 5-Star Service Model
 - Setting Up Systems & Processes
 - Creating Workflows

- 8
- Marketing Action Plan
 - Choosing Your Channel
 - Cultivating COIs
 - Websites that Work
 - Marketing Implementation
 - Digital Marketing...

- 9
- Action & Accountability
 - Run Your Practice Like a Business
 - Managing Firm Performance

L I M I T L E S S

LIMITLESS CLASS OF 2022



JANUARY 24
RETREAT 1: VIRTUAL
PERFORMANCE U.



WK OF MARCH 19
RETREAT 2: LIVE (PARK CITY)
VALUE U.



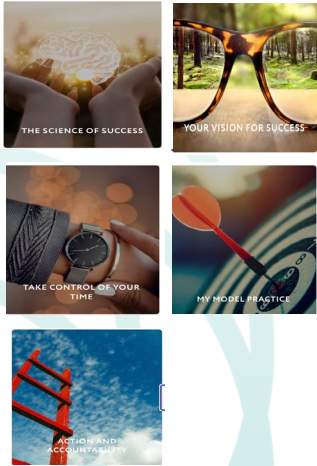
WK OF JUNE 13
RETREAT 3: VIRTUAL
PRODUCTIVITY U.



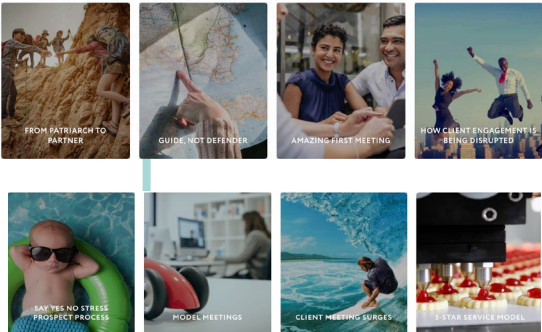
WK OF SEPT. 19
RETREAT 4: LIVE (PARK CITY)
GROWTH U.

1 st MON : MASTERMIND MEETING OR WORK TIME	Coaching Center (Tribe) & Learning Center (Website)
2 nd MON: OFFICE HOURS	Accountability Check-Ins
3 rd MON: TRIBE TALKS	Quarterly Practice Reviews
4 th MON : 90-MIN COACHING CALLS	1:1 Coach Check-Ins

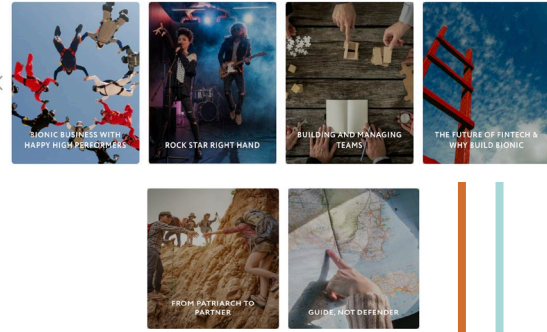
PERFORMANCE U.



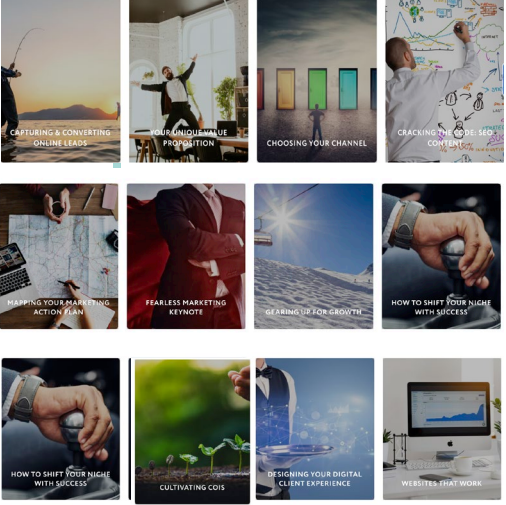
VALUE U.



SYSTEMS U.



GROWTH U.



MASTERMIND MEET UP

LEADERS RADICAL RETREAT

MASTERMIND MEET UP

MASTERMIND MEET UP

The Commitments



EXPERIENCE

Our Commitment:
deliver massive value with a group coaching experience to support the breakthroughs you need to build a \$1M+ lifestyle practice, delivered with a personal approach



ENGAGEMENT

Inbox Insight: our direct line to you– read these!
Member Site: The work lives here
Tribe: Collaboration & Coaching here
Coaching Calls: deeper coaching discussions
Office Hours: Your Q&A and Check-Ins
Inbox: Service Needs, Special Requests
Monthly Check-Ins help you stay on track



EXPECTATIONS

Your Commitment:
4 hours week, 1 day month
come to class, do the work,
engage w/community, ask for help
make & keep commitments
Use Tribe for Coaching & Accountability

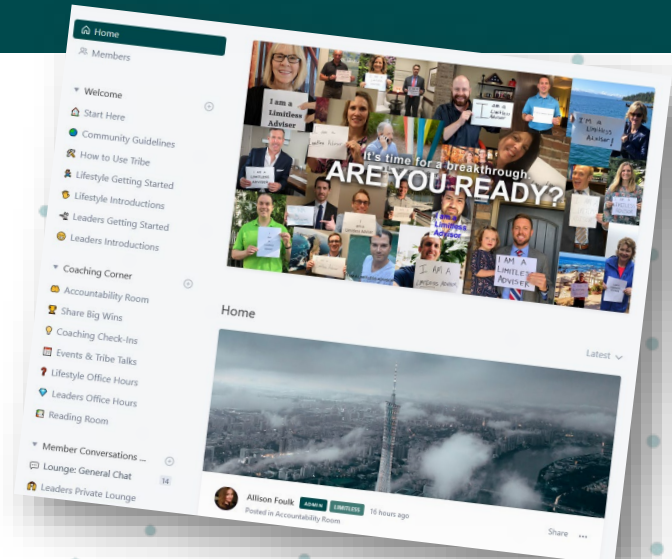


Investment precedes return, always.



Your Personal Coaching Plan clarifies your Limitless pathway (coming soon).

Go here to share goals, create commitments, and get coaching support.

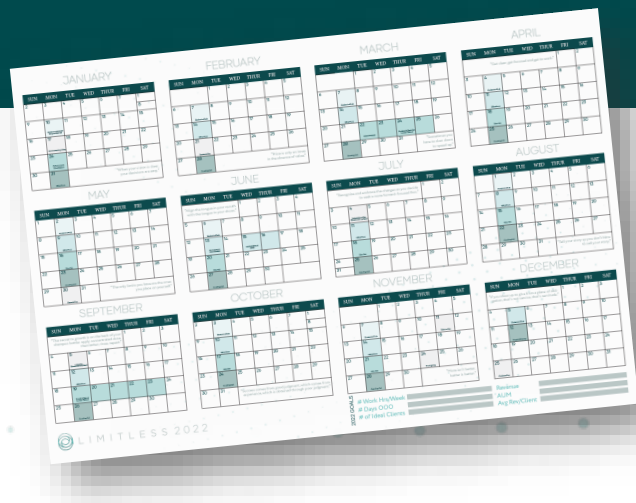


Welcome Package



THE ANNUAL CALENDAR

SET YOUR VISION
SCHEDULE FOR 2022



THE JOURNAL

CREATE CLARITY AND CREATE
CRAZY GOOD MOMENTUM

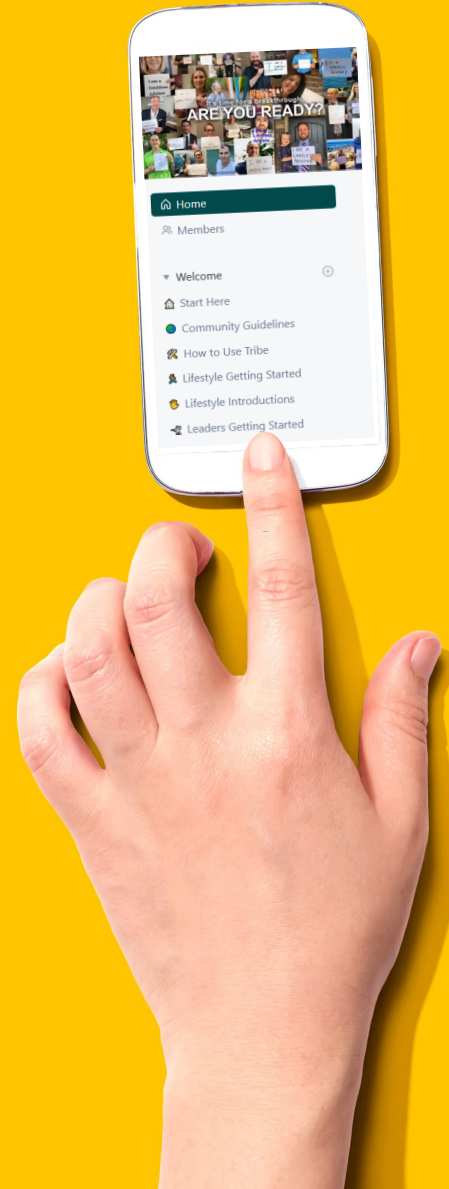


THE POST ITS & STICKER

STAY CLEAR AND FOCUSED TO
ELIMINATE DISTRACTIONS



GOOD VIBES TRIBE & COACHING CENTER



Get ready to
get Limitless.

THE LIMITLESS MEMBER SITE

COACHING CENTER



TESTLEADERS2022 TEST

ACCOUNT

CALENDAR

COACHING CENTER ▾

COACHING CALLS

OFFICE HOURS

MASTERMINDS

SUPPORT

LEARNING CENTER ▾

GOOD VIBES TRIBE

LOGOUT

PROGRAM OUTLINE

CLARITY & ACCOUNTABILITY

- Action and Accountability
- Take Control of Your Time
- The Science of Success
- Your Vision for Success

COMMUNICATING YOUR VALUE

- Nailing Your Niche
- Finding Your Fee Model
- Telling Your Story

VALUE U: DELIVERING DEEPER VALUE

ACCOUNT

CALENDAR

COACHING CENTER ▾

COACHING CALLS

OFFICE HOURS

MASTERMINDS

LEARNING CENTER ▾

LEARNING PATHS

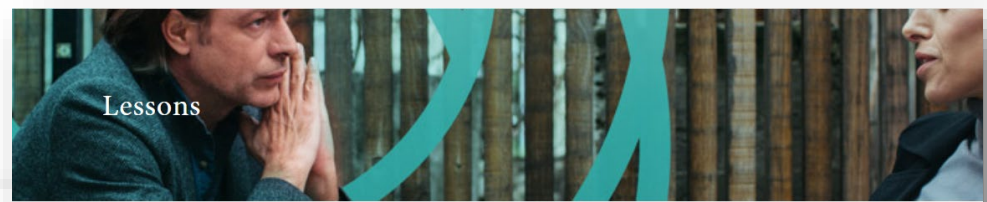
LESSONS

LIBRARY

STRATEGIC PARTNERS

GOOD VIBES TRIBE

LOGOUT



Lessons

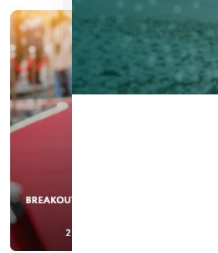
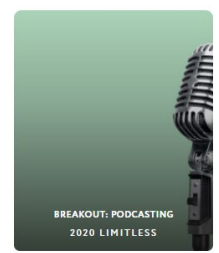
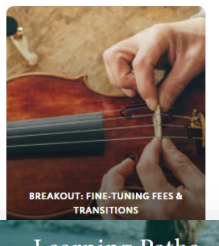
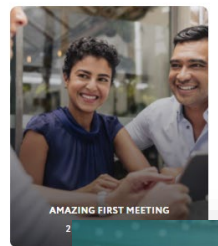
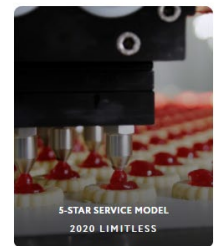
Sort by

Search

Categories

- Growth (52)
- Advice and Planning (17)
- Personal Productivity (13)
- Client Services (12)
- Planning & Performance (10)
- Operations (6)
- People (4)

RESET

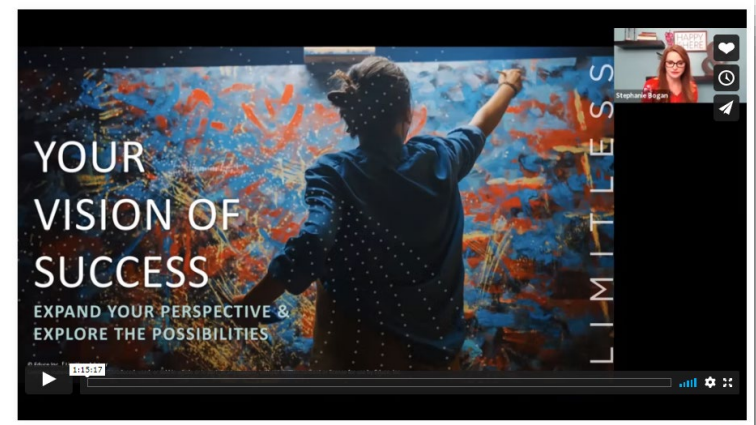
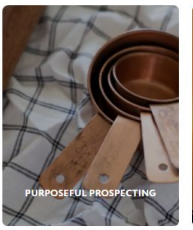
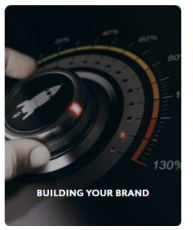
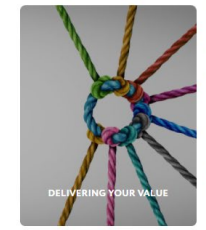
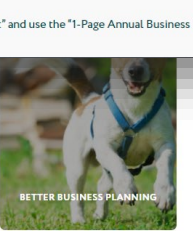
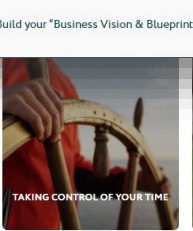
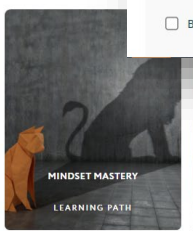
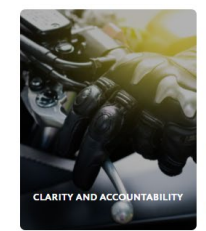


Learning Paths

Learning paths bundle related courses into a specialized

Search

Sort by



Building your limitless practice begins with creating a clear vision of a wildly successful business and life that you love. Your practice transformation kicks off as you come to understand the incredible power of mindset, bring clarity to your vision and goals, and architect a business blueprint that outlines your strategy for success.

- Read "Your Vision for Success Guidebook"
- Complete "My Limitless Life" to create your vision for success
- Build your "Business Vision & Blueprint" and use the "1-Page Annual Business Plan" to set 3 and 1-year goals



ALLISON FOULK

COURSE OUTLINE

HOME

ACCOUNT

CALENDAR

COACHING CENTER ▾

LEARNING CENTER ▾

GOOD VIBES TRIBE

ADMIN ONLY ▾

LOGOUT

LIMITLESS

Home

Members

Welcome

Start Here

Community Guidelines

How to Use Tribe

Lifestyle Getting Started

Lifestyle Introductions

Leaders Getting Started

Leaders Introductions

Coaching Corner

Lifestyle Accountability R...

Leaders Accountability Ro...

Reading Room

Share Big Wins

Coaching Check-Ins

Lifestyle Accountability Room



New Post

Posts 1

Members 39

Latest ▾



Own Your Accountability

Share ...



Allison Foulk

ADMIN

LIMITLESS

4 days ago

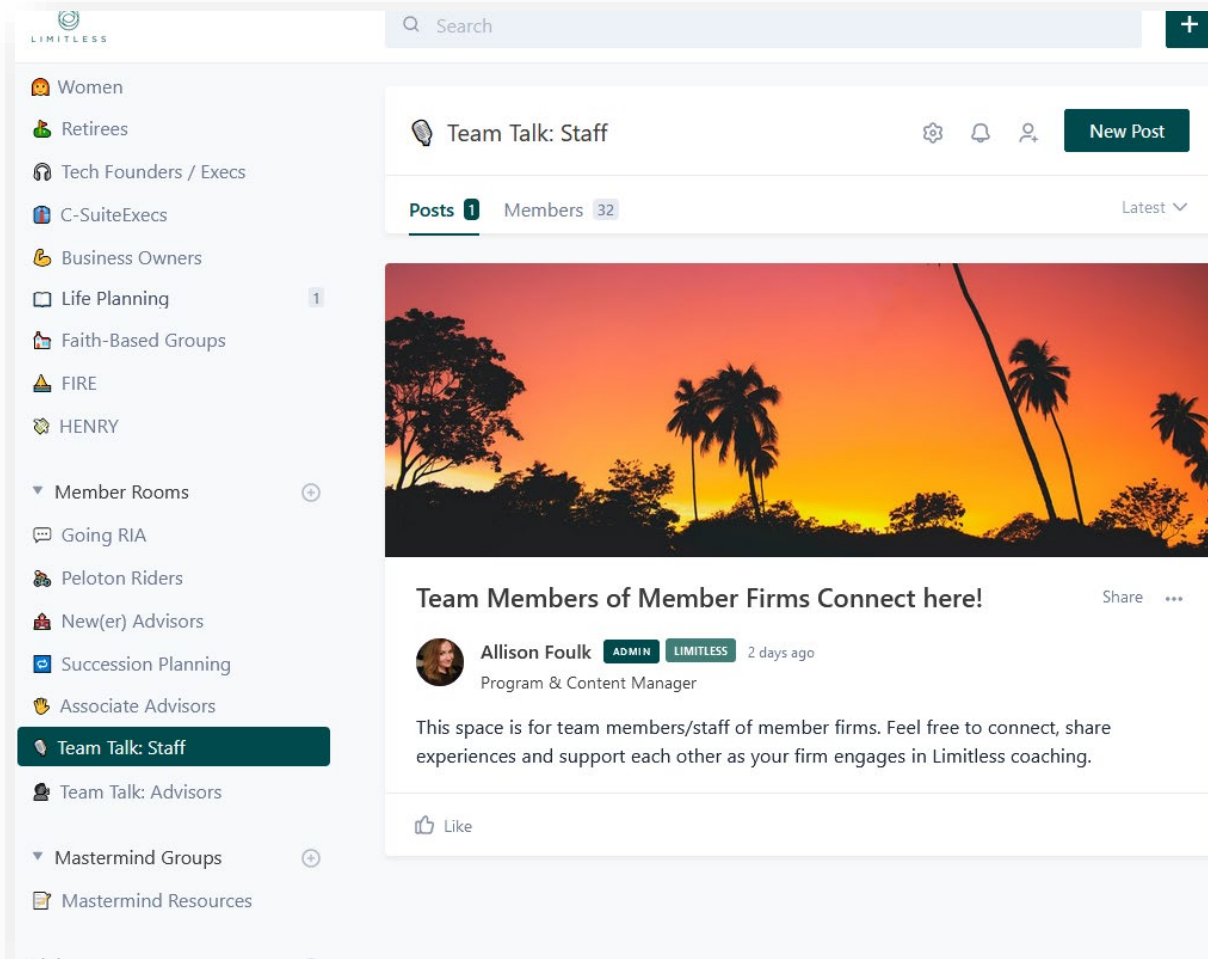
Program & Content Manager

Kick off your 2022 Coaching by posting your "Big Why" below.

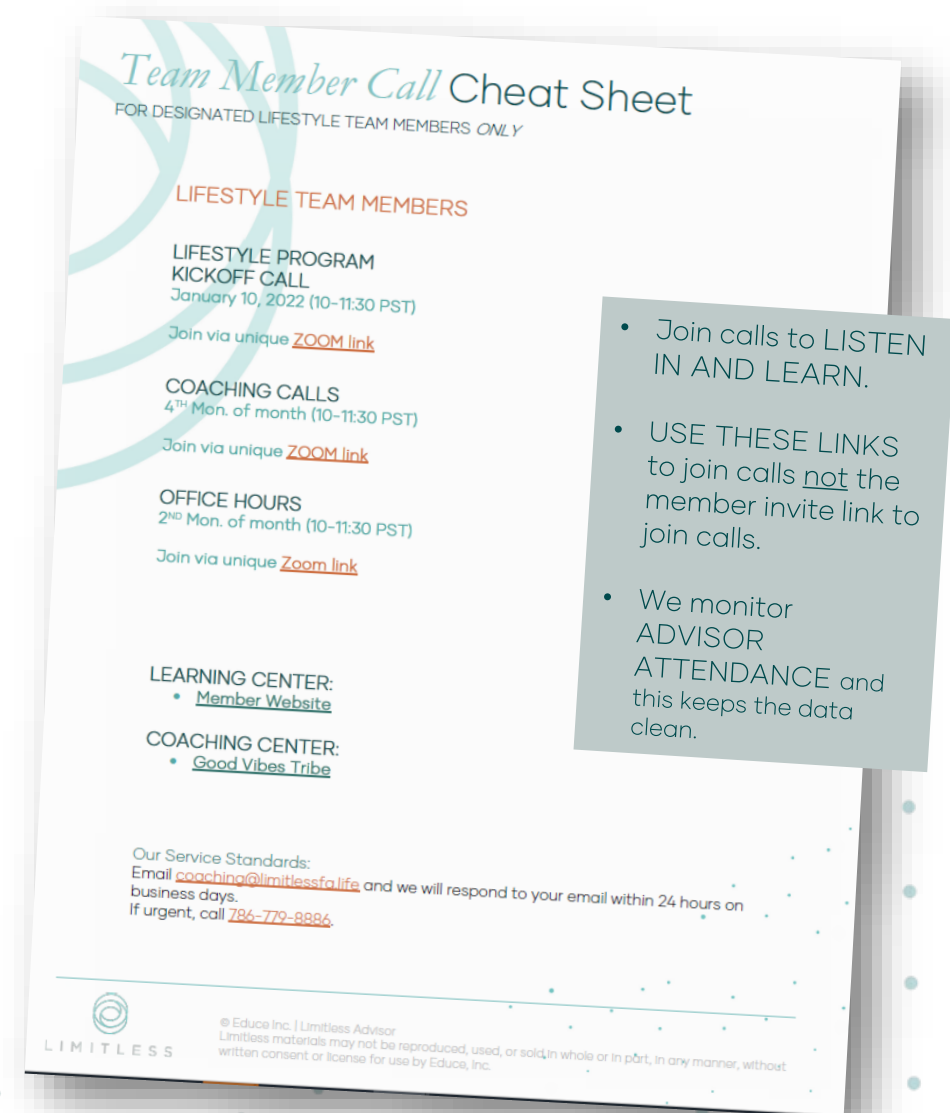
Like

For Team Members

Team Member Call Cheat sheet



LIMITLESS



MAKING THE CLIMB



Everything you need to succeed is here:
courses, coaching and community



You are the magic



Now, get clear, get focused, and get to work
(if you get stuck, we're here to help unstuck you)

LIM PERFORMANCE U. VIRTUAL RETREAT

January 24, 2021

8:30-8:45  Welcome
Stephanie Bogan

8:45-9:45  The Science of Success
Stephanie Bogan

9:45-9:50  Session Transition

9:50-10:45  Vision for Success
Stephanie Bogan & Adam Cmejla

 Strategic Planning
Tiffany Charles & Jarrod Musick

10:45-11:15  Lunch Break

11:15-12:15  Action & Accountability
Stephanie Bogan & Adam Cmejla

 Managing Firm Performance
Tiffany Charles & Jarrod Musick



12:15-12:20  Session Transition

12:20-1:35  Taking Control of Your Time
Stephanie Bogan & Adam Cmejla

1:35-1:40  Session Transition

1:40-2:10  Breakouts

 Clarity, Accountability & Mindset
Stephanie Bogan

 Taking Back Your Time
Adam Cmejla

 Planning & Performance
Tiffany Charles & Jarrod Musick

2:10-2:30  Closing Session
Stephanie Bogan



LIMITLESS



THE TRIBE

ONLINE MEMBER COACHING & COMMUNITY

Login through Member Website link



INBOX INSIGHTS

Make a habit of checking your biweekly message!
(Approve sender to keep from going to spam)



VIRTUAL RETREAT

01.24: Performance U. Virtual Retreat, 8:30 – 2:30 PT



PERFORMANCE U. RETREAT

3.22-23: Lifestyle Days

3.24: Mastermind Meet-Ups

3.24-25: Leaders Retreat



LET'S SIT AND TALK

WHAT QUESTIONS DO YOU HAVE?



Step 1:
Breathe

LIESTYLE MASTERMIND MEET & GREET

- Up Next...

LEADERS KICKOFF

- 1:00 PM PT

*Learning to "belly breathe" helps ease your body's response to stress and tension.
Harvard Mind Body Institute, Harvard Medical School*

WHY MASTERMINDS?

SOME OF THE MOST SUCCESSFUL PEOPLE IN HISTORY USE MASTERMIND GROUPS



CLARITY

Stay Clear & Focused

Your peer group helps you gain perspective, get clear and stay focused on the right priorities



COLLABORATION

Raise the Bar & Get Results

Connect with like-minded peers to collaborate and coach each other to new heights.



ACCOUNTABILITY

There is No Place to Hide

Maintain positive momentum and make meaningful progress by elevating your commitment.



MASTERMIND TRAINING

BE ON THE LOOKOUT!

Watch your Inbox for Mastermind Training video and resource the week of January 17.

Mastermind Meet & Greet 30 minutes

1

SHARE AND CONNECT

- Share your Big Why
- Share what you want to get out of this Mastermind group
- Review and sign Mastermind Commitments
- Save Mastermind Commitment, post to your MM Tribe Room
- Exchange contact information

2

CONFIRM MASTERMIND CALL DATES & TIME

- First Monday of each month at 10 am PT
- Set meeting time at 30 minutes per member (avg 2.5 hrs)
- Someone take responsibility for setting & sending Zoom invites
- Add coaching@limitlessfa.life to all invites (for check-ins)

3

DEFINE ROLES FOR FIRST CALL

- Identify roles by month using Mastermind Roles Calendar
- Confirm roles for first meeting

4

SELECT A MASTERMIND NAME

- Select a name for your Mastermind Group (have fun!)
- Email Mastermind name to coaching@limitlessfa.life



See CHAT and download links for your Meet & Greet:

- Mastermind Commitment Sheet
- 2022 Mastermind Roles Calendar