

LIMITLESS Coaching Call Transcript

JANUARY 9TH, 2023
LEADERS KICK OFF CALL

I am Stephanie, and I am here with Tiff Jared and Adam and your peer group for this year to really kick off our leaders

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00:04:06.800 --> 00:04:22.480

Stephanie Bogan: coaching experience for this year. we are, I know I'm going to say this about 6 times today. We are really excited about leaders in the experience that we've put together for you this year, as with all things that limitless, our job here is to help you build a wildly successful business

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00:04:22.700 --> 00:04:37.510

Stephanie Bogan: and a life that you love to me kind of our grounding anchors, if you will, or those 5 freedoms right, you can call it limitless advisors, epic entrepreneurs. These apply to anyone who's founding and often leading a firm irrespective

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00:04:37.540 --> 00:04:53.940

Stephanie Bogan: of the profession that they happen to be in right. We want to work with purpose on our terms. One of those things we're talking to you about. This vision and clarity conversations is what's purpose for you? What are your terms? We have so many places that we shrink ourselves and compromise. We're going to address those this year.

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00:04:54.050 --> 00:05:03.510

Stephanie Bogan: But step one is getting really clear on what your purpose and terms are, so that all of your energy, actions, and capital can be aligned with that as much as possible one

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00:05:03.590 --> 00:05:17.159

Stephanie Bogan: To how do you create a space where you do work? You love not just planning or wealth management. But how? Melissa, Chris, David Ron! How do you show up every day like inspired and powered, motivated, ready to tackle what's in front of you

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00:05:17.170 --> 00:05:27.600

Stephanie Bogan: from that place of inspired action versus what we're gonna talk about. Efforted action, right? How do we get in that state? More of the time, because what we know is when we're there, what happens?

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00:05:27.830 --> 00:05:30.040



Stephanie Bogan: Awesome sauce happens right there's no

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00:05:30.060 --> 00:05:35.270

Stephanie Bogan: probably like we just figure find a way, or make one, as we like to say, we've all had those moments right.

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00:05:35.570 --> 00:05:38.030

Stephanie Bogan: We all want to spend more time in that space

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00:05:38.200 --> 00:05:48.420

Stephanie Bogan: because it's energy creating, and it tends to be revenue, producing 3. We want to work with people. We enjoy our team, our clients, our centers of influence, right our partners, our coaching community.

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00:05:48.590 --> 00:05:58.580

Stephanie Bogan: You spend time with people. Those are the experiences that framed your life and craft, your success. The people that you spend your time with are a huge influencer to your mindset.

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00:05:58.630 --> 00:06:17.759

Stephanie Bogan: and the momentum and the movement that you take. So you want to surround yourself with people that you really enjoy that right, elevate you support you and grow you in positive ways. we all. We're all here to enjoy financial success abundances of it. We want to feel great about doing it. No guilt, no apologies, no compromises. Just yeah, we can.

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00:06:17.770 --> 00:06:28.369

Stephanie Bogan: And we're going to feel great about the success that we're creating. And along the way, not when along the way we want to live a life of happiness for moment and contribution.

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00:06:28.830 --> 00:06:40.350

Stephanie Bogan: And all of my what 30 years of doing this, almost like these are pretty common themes for all the founders and leaders I've worked with right, and I call it being limitless. you can call it whatever works for you.

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00:06:40.450 --> 00:06:49.400

Stephanie Bogan: but that's your goal is to sit in this space and really ask yourself, what does this mean to be? What's my version of those 5 freedoms, and that's what we're going to explore this year.

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00:06:49.420 --> 00:07:07.360

Stephanie Bogan: I think most of you have heard my story, so i'll make it really brief. My version was, I had to learn that success wasn't striving money wasn't going to give me meaning right. I had to radically redefine



my definition of success beyond economics because I had checked that box in terms of my financial independence.

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00:07:07.640 --> 00:07:19.510

Stephanie Bogan: But, interestingly, the high lasted like 3 days. It didn't radically change. My experience gave me a lot of comfort. I got to have some cool experiences like that's all awesome, as we all know.

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00:07:20.020 --> 00:07:30.630

Stephanie Bogan: but that's not what gets us up inspires us and motivates us and fulfills us, and lets us do the work and love the people and take the actions we want to take, to feel really good. About the time that we're spending on this planet

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00:07:30.670 --> 00:07:40.659

Stephanie Bogan: leaders is about following the more and better that calls you without having to compromise your personal definition of success. How do we really create? Not

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00:07:41.020 --> 00:07:50.639

Stephanie Bogan: work life balance, which is such a loaded term? That's like a teeter toddler at the playground? If something goes up by definition. Something has to go down.

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00:07:50.780 --> 00:08:06.250

Stephanie Bogan: You might get an email from me at 4, 30 in the morning, because I wake up early, and I might be up from 4, 30 to 6, 30, getting through my dailies, my inboxes, and my team questions and all of that, so I can drop the kids off and go ski with my husband for 3 or 4 h, and then come back in the afternoon.

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00:08:06.260 --> 00:08:14.310

Stephanie Bogan: Do not judge the quality of my life. By the time that you get an email for me that's like old thinking. I like what we call equilibrium

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00:08:14.540 --> 00:08:24.749

Stephanie Bogan: life work, equilibrium. How do you create a model for working and living that allows the parts of your life that are important to you to really integrate in a way

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00:08:24.790 --> 00:08:30.889

Stephanie Bogan: that you create the work and the life experience that allows you to live those 5 freedoms and feel really good while you're doing it.

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00:08:31.350 --> 00:08:42.730

Stephanie Bogan: So you guys mostly know my story right built a firm, sold a firm had to go find myself. I'm. Retired to share what I learned, and that's what limitless is all about. How do we live

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00:08:42.820 --> 00:08:48.579

Stephanie Bogan: a life without limits, and create new levels of success for ourselves, not through the grind and the gearing.

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00:08:48.880 --> 00:09:02.939

Stephanie Bogan: not through that effort at action, but through the inspired action, through all those things you've heard us talk about so much already. Clarity, action, accountability, that's what we're going to really integrate into your working lives and your thought patterns over the course of this year.

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00:09:03.010 --> 00:09:20.680

Stephanie Bogan: if you're an alumni, or you were on the lifestyle call this morning, You're familiar with the faculty at this point. I am your cruise director for this crazy journey that you have chosen to be on like any cruise or journey right climbing Everest or the love boat You're gonna have highs and lows

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00:09:20.690 --> 00:09:27.680

Stephanie Bogan: Running a business is a lot like a roller coaster. Ride. It's like a swing from euphoria and to exasperation.

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00:09:27.860 --> 00:09:29.270

Stephanie Bogan: and back again

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00:09:29.520 --> 00:09:42.000

Stephanie Bogan: on a daily basis without the drama. Me right. We all feel those highs, and we feel those lows and a part of what we want to do is level that out. So we've got a lot of no knowledge and know how to help you do that.

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00:09:42.090 --> 00:09:49.400

Stephanie Bogan: So i'm your cruise director Lauren is Lauren so lifestyle. All right with that, i'm gonna let you guys take it and introduce yourselves.

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00:09:49.430 --> 00:10:09.300

Lauren Kaufman: Yeah, hi, everyone. I think I've either met most of you or emailed all of you at this point. So that's nice to put some faces to names, but I am Lauren. I am one of the practice coaches here at limitless, and we'll be working very closely with you all, and Stephanie and Tiffany and Jared and Adam and all the other coaches. This year.



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00:10:09.310 --> 00:10:28.630

Lauren Kaufman: prior to limitless, I spent 8 years at dimensional fund advisors helping firms tackle their most pressing business issues worked with firms ranging from 250 K. And revenue to 15 million. So all sizes, i'm really looking forward to a great group and year together.

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00:10:30.140 --> 00:10:30.810

Okay.

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00:10:31.460 --> 00:10:49.889

Jackie Benjamin: hi, everyone. I'm Jackie and I join limitless as the new coach and basically dual hybrid role where I am, the coo for limitless behind the scenes, but also available to the members as operations. Co coach

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00:10:49.900 --> 00:11:00.320

Jackie Benjamin: 24 years experience working operations management for various size ria firms, the the largest being 1.5 billion

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00:11:00.330 --> 00:11:11.639

Jackie Benjamin: so definitely looking forward to getting to know all of you, if I haven't had an opportunity to speak but definitely looking forward to being a resource for you.

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00:11:13.900 --> 00:11:39.599

Adam Cmejla, CFP®: Adam Schmeila, a founder of integrated planning and wealth management predominantly here, as it pertains to leaders will likely be sitting second chair to both Jared and Tiffany. as they graciously let me participate in their sandbox and kind of reverse in lifestyle, so i'll i'll primarily spend, and we'll be spending a lot of my time in the lifestyle section of limitless. But we'll no doubt come and party in your sandbox from now.

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00:11:39.710 --> 00:11:51.179

Adam Cmejla, CFP®: from time to time as well. building a a scaling firm here in Indianapolis working with clients nationwide, so excited to both participate and learn from you as well share what's worked in in our growth, trajectory as well.

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00:11:51.270 --> 00:12:02.209

Stephanie Bogan: Yeah, Adam's experience a lot of graphic growth, right? And so it's really about how you scale that growth. And so there's some things he does really really well that we'll have him come and talk to you about. They also see him at retreat as well.

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00:12:03.850 --> 00:12:05.829

Stephanie Bogan: I spent a lot of time with Tiff and Jared.

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00:12:06.000 --> 00:12:08.190

Jarrold Musick: Yes, yes.

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00:12:08.370 --> 00:12:38.360

Jarrold Musick: hi for all of the first year members here to leaders Welcome, welcome, Very excited to work with each and every one of you. Tiffany and I are business partners here at Destiny. Capital! we've done some interesting things. we've paid a lot of very expensive tuition and learned a lot of very hard lessons. we're very excited to share those with you guys. Some of the things that you know is you're in the leader's seat and scaling and growing your firm in the transition

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00:12:38.370 --> 00:12:57.170

Jarrold Musick: that you're going to be making You know there's just such a great community here with talented people. who are all solving similar problems in slightly different ways. And I'm just really excited for the opportunity to get to know each one of you and and be able to create this community to share and grow and move forward.

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00:12:59.480 --> 00:13:06.560

Tiffany Charles: Hi! Everyone! I'm Tiffany, Charles as dared mentioned. We're partners and my focus in the firm is on

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00:13:06.570 --> 00:13:23.000

Tiffany Charles: growth. And i'm super excited to be here with each and every one of you. Something different from lifestyle to leaders is how we have time, capital, and energy, and what we can put that towards in our practice to scale in a very great way, while also having the life that we love.

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00:13:23.010 --> 00:13:32.310

Tiffany Charles: I've been working really hard on practicing that and loving every aspect. I love the seat that i'm in. Who I do it with the team that we've built, and the ways that we're

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00:13:32.320 --> 00:13:45.740

Tiffany Charles: looking into the future, and and the ways that we're going to grow the ideas that it's predictable and disciplined, and that we're building value in a really great way. Well, I am very much mommy. My 3 littles and being super present to their life. So

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00:13:45.780 --> 00:14:09.489

Tiffany Charles: look forward to working with each one of you, and taking the limitless, not only from a practice owner, but into your practice, and



do your clients and into your life. and if you have any questions when it comes to growth, or we've successfully transitioned first generation to second generation, which is a huge fee. Not a lot of ras have done it and done it well, and we were able to do that, and

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00:14:09.500 --> 00:14:19.580

Tiffany Charles: we also learned a lot along the way. so any questions we're here for you and can't wait to just make an up level some really great things in 2,023.

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00:14:20.070 --> 00:14:35.940

Stephanie Bogan: So that is the coaching team that is here to support You i'm gonna ask each of you to take 20 or 30 s. Right? So the abridged version you'll get to spend a lot more time together in your meetups, and right is through our calls, because again it's much much smaller into the group.

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00:14:35.950 --> 00:14:40.919

Stephanie Bogan: we're gonna go around, and i'm gonna hatch each of you to share who you are

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00:14:41.410 --> 00:14:53.990

Stephanie Bogan: quick rundown of your firm whether you're an alumni or a new member, and what you what's most, what most has your attention this year. I think it's a good place to start. melissa you are.

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00:14:54.210 --> 00:14:57.220

Stephanie Bogan: actually we oh, actually this didn't go. I'm sorry.

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00:14:57.300 --> 00:15:06.389

Stephanie Bogan: My all my all my camera, my views of you are covering the slide. So, Liz, I well, I almost cut you off, and then I thought, No, I'll just wait till my turn, and then i'll say it.

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00:15:06.600 --> 00:15:20.140

Liz Hand, CFP®: so i'm liz i'm the mindset coach for limitless, and also a second Gen. Business owner my brother and I. This is our second year of owning pleasant wealth After purchasing it from my dad.

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00:15:20.250 --> 00:15:38.580

Liz Hand, CFP®: I am excited about the work that I've done with limitless and just up leveling my leadership. And I come from an Amish and Mennonite background where women really are supposed to be submissive and not point out when they're skipped over on a slide. and so i'm learning how to own my voice and up level myself

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00:15:38.590 --> 00:15:44.989

Liz Hand, CFP®: in my leadership, not only of this firm with the clients that we that we have, but also just really excited about being

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00:15:45.180 --> 00:15:46.690

Liz Hand, CFP®: with limitless

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00:15:46.880 --> 00:15:58.659

Stephanie Bogan: and les we would never skip you. That's just not possible. I just couldn't see you, because I was trying to see everyone on the call, and it it like the kick that the view starts to come by me like a third monitor above the camera, so I can see everyone.

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00:15:58.760 --> 00:16:14.600

Stephanie Bogan: so we have obviously a really talented, and I hope you guys get the like committed right? None of these people have to be here. They're here because they've had such a compelling experience and limitless, and they love elevating others and helping them go through that same transformation

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00:16:14.610 --> 00:16:27.000

Stephanie Bogan: that they invest their time here with us. So, really soak up their experience, their knowledge. They're you. You're not gonna find a more sharing group of people, not just them, but each other. So.

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00:16:27.060 --> 00:16:38.230

Stephanie Bogan: circling back, I think I've now covered everyone around our alumni. Obviously Michael Julie Megan, right? Other great leaders and friends from across the space will be spending time with us over the course of this year.

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00:16:38.530 --> 00:16:46.489

Stephanie Bogan: but the other equally important group is all of you. On this call. You will hands down without question, get

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00:16:46.520 --> 00:16:52.560

Stephanie Bogan: as much or more from each other as you do from limitless. We're going to help facilitate a lot of that.

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00:16:52.800 --> 00:16:59.570

Stephanie Bogan: But you're going to find that the engagement you have the strategies, the sharing the collaboration is going to be

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00:17:00.100 --> 00:17:17.670

Stephanie Bogan: unlike anything that you have very likely experienced before. Right it's it really is that next level of commitment and a



catalyst for growth. So with that Melissa, why, don't we start with you and the we'll go around I I don't know if you guys see each other in the same order. I do. But after Melissa's Chris and Dave

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00:17:17.750 --> 00:17:24.270

Stephanie Bogan: Jennifer, Ron Bryant, we can take it from there. So Melissa, you and take like 30 s, and share with us a little bit about who you are.

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00:17:24.930 --> 00:17:36.089

Melissa Joy: Yes, I'm Melissa Joy. I live in Dexter, Michigan, just outside of Ann Arbor and founded coral planning in 2,018 after being at a larger hybrid.

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00:17:36.110 --> 00:17:41.149

Melissa Joy: All right. And this is my third year and limitless second year, and leaders

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00:17:44.110 --> 00:17:46.079

Stephanie Bogan: gonna have a great year. Melissa

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00:17:46.440 --> 00:17:52.209

Lauren Kaufman: stuff. Do you want to? Stop sharing your screen so we can all see each other? Oh, i'm sorry. Yes, absolutely Thank you so much.

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00:17:54.600 --> 00:17:58.229

Stephanie Bogan: It's way better when we can see each other. And you're not a team in tiny little blocks.

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00:17:59.840 --> 00:18:01.160

Stephanie Bogan: Chris!

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00:18:02.480 --> 00:18:04.390

Chris Hansen, CFP®: I'm. Chris Hansen.

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00:18:04.460 --> 00:18:08.120

Chris Hansen, CFP®: This is my fourth year, and limitless

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00:18:08.270 --> 00:18:20.469

Chris Hansen, CFP®: I look through the names and appears i'm the only Chris, so that ought to help some confusion this year. I think we have 3. Chris. Last year. I actually started my business in 94

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00:18:20.510 --> 00:18:22.810



Chris Hansen, CFP®: actually in 91 I first registered.

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00:18:22.860 --> 00:18:41.470

Chris Hansen, CFP®: But it was a a lifestyle silo business. And for the last 4 or 5 years I've been transitioning out the other partner and trying to turn this into more of an ongoing business. And it's we're making a ton of progress, and a lot of that is, thanks to our limitless

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00:18:41.510 --> 00:18:45.980

Chris Hansen, CFP®: we're in Cincinnati, Ohio. Also

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00:18:46.690 --> 00:18:49.529

Stephanie Bogan: committed in Cincinnati is going to be your tagline.

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00:18:50.520 --> 00:18:51.830

I can.

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00:18:52.120 --> 00:18:53.829

Stephanie Bogan: if you want to say I

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00:18:55.870 --> 00:19:12.449

Dave Burgio: Yeah, hey? Hey, Stephanie, hey? Everybody great to see everyone I excited about starting this this program again this year. I've been with them at this. I started last year, and it's been fantastic. I've been in the business now about 29 years.

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00:19:12.460 --> 00:19:21.859

Dave Burgio: I went independent in 2,011, and you know we've learned some some great things with limitless last year. I've got a team

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00:19:21.870 --> 00:19:40.660

Dave Burgio: that we that we work together with, and everybody embraced these principles together. So it wasn't just me, and we really, you know, we we learned so much last year, and I think this is going to be like a a key here, just to kind of Take it forward, you know. Just continue it. So yeah, really happy to be part of the group again. Thank you.

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00:19:40.710 --> 00:19:41.610

Stephanie Bogan: Awesome.

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00:19:43.680 --> 00:19:50.019

Stephanie Bogan: Jennifer. I put the order in the chat just to keep us on track. I was like there will be a test at the end.

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00:19:51.100 --> 00:19:53.240
Stephanie Bogan: This is a test.

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00:19:54.540 --> 00:20:04.139
Jennifer Patterson: all right. Thanks, Stephanie. So hey, everyone I'm Jennifer. this is actually my fourth year in limitless first year in leaders

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00:20:04.150 --> 00:20:16.900
Jennifer Patterson: joined in 2,020, which was fun and and I joined actually join limitless because I I started my firm when I broke away in 2,006, and

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00:20:17.130 --> 00:20:24.360
Jennifer Patterson: actually built a really big 6, multiple, 6 figure firm or 7 figure firm, and then in 2,000

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00:20:24.680 --> 00:20:29.489
Jennifer Patterson: 14, decided to break it and take it down to me only

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00:20:29.710 --> 00:20:35.670
Jennifer Patterson: because I realized that it was me or the firm. And so 20 by 2,019. I was bored.

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00:20:35.690 --> 00:20:38.769
Jennifer Patterson: and my kids are older. And so I started thinking

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00:20:38.790 --> 00:20:50.799
Jennifer Patterson: we need to figure out what's next, and so limitless has been my ticket. So i'm very excited to be in leaders now, so that we can really get to the next level. I have a little team of

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00:20:50.980 --> 00:21:05.130
Jennifer Patterson: One full time client service have actually just found a tax associate which is going to be fabulous. And then, my son, who is 25, is training to be my next generation. He is training to be our

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00:21:05.280 --> 00:21:06.490
Jennifer Patterson: our next lead.

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00:21:06.520 --> 00:21:11.010
Stephanie Bogan: so excited to have you with this and leaders this year, Jen

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00:21:12.650 --> 00:21:14.480
Stephanie Bogan: Ron. Welcome.

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00:21:14.580 --> 00:21:18.840
Ron Wyatt: good to be here. I oh, I am new to the program.

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00:21:19.480 --> 00:21:28.139
Ron Wyatt: I was coasting along. I've been in the business about 30 years, and with the company, and and it's called Crew of Design in Pittsburgh, Pennsylvania.

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00:21:28.470 --> 00:21:39.859
Ron Wyatt: and kind of coasting along as a solo practice, and then to my children, join me. So now we're changing it to a small enterprise, and I'm on the

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00:21:39.990 --> 00:21:51.200
Ron Wyatt: kind of have that growth track again. And i'm wearing some new hats that I've never worn before, and I really need some help, so that I don't go through the the pain of crown and air.

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00:21:51.960 --> 00:22:01.839
Stephanie Bogan: Yeah, there's just so much you guys are gonna learn about the different stages and the strategies you're at the shifts that you're making. And you're gonna learn through a lot of that together. So that's great wrong. fantastic.

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00:22:03.740 --> 00:22:05.780
Stephanie Bogan: Who is next? I have to go back to the list.

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00:22:05.960 --> 00:22:07.860
Stephanie Bogan: Brian.

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00:22:08.320 --> 00:22:09.080
Brian Hill, CFP®: Yeah.

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00:22:09.130 --> 00:22:13.369
Brian Hill, CFP®: I'm Brian Hill, i'm in I'm from Jackson, Mississippi.

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00:22:13.560 --> 00:22:18.860
Brian Hill, CFP®: and this is my first year and leaders. Last year I was in lifestyle

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00:22:20.510 --> 00:22:24.700



Brian Hill, CFP®: and in the business 25 years or so, and

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00:22:25.030 --> 00:22:43.259

Stephanie Bogan: i'm really excited about the football game tonight, because I got a daughter goes to Tcu. So so frogs is what they do there. And so we know when we have retreat. We have to check. What right? If frogs are having a game because Brian will be like? No, I can. I have to go watch the game. I can join you for dinner.

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00:22:43.510 --> 00:22:45.629

Stephanie Bogan: I feel your commitment.

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00:22:45.770 --> 00:22:46.980

Brian Hill, CFP®: Yes.

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00:22:50.170 --> 00:23:04.630

Neal Albritton: i'm Neil it is my third year in limitless second in leaders like Liz. I'm a second generation owner. I've bought the practice out from my father. So there we go, coach, nice job

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00:23:04.640 --> 00:23:21.509

Neal Albritton: We're based in St. Louis, Missouri, and we're transitioning our practice to what we call a virtual family office. So we're continuing to move upstream with our clientele, while at the same time reducing the number of clients that we serve, so that comes with its own challenges and limitless, is helping us along the way.

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00:23:21.800 --> 00:23:24.589

Stephanie Bogan: That's great lean, and you want to say, Hi

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00:23:25.360 --> 00:23:45.319

Liana Poodiack: door Hi! I'm leona putiac we're from King New Hampshire. I am the senior member of our multi generational practice. my son Travis is also on this call with me. I've been in the business since 98, and we've done different programs but this is our first year with limitless

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00:23:45.490 --> 00:24:01.130

Liana Poodiack: and looking forward to everything that we're going to learn. we're needing to kind of refocus everything over the next year. As we are striving to at some point, go independent. So it is what we are working towards.

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00:24:01.250 --> 00:24:10.530

Stephanie Bogan: Excellent! It's a great opportunity to like, reflect and retool and re-engineer, for, like what's next chapter and what's next? Right? So you get to redesign it as you make that shift. That's great.



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00:24:10.840 --> 00:24:13.750

Stephanie Bogan: Mr.

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00:24:14.220 --> 00:24:32.869

Lyle Rosman: My name is Lal Rossman. I myself and my brother have a small practice out on Long Island. We were with Wells up until July left to join Bleakly financial, which is an independent ria about 9 or 10 billion this world we made the move new to independent life.

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00:24:32.880 --> 00:24:51.659

Lyle Rosman: They brought Stephanie out for our corporate retreat back in October. and it was at that point that I found out how miserable I was being happy. And here I am. So we're gonna throw this at the wall and see how it works. Awesome. You made me sound like such a passenger cheerleader, Lyle.

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00:24:51.870 --> 00:24:52.630

Right?

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00:24:52.940 --> 00:24:59.260

Stephanie Bogan: So many opportunities to hit that next level success, and when you're ready, right, you hear them, and you take action on them, which is great.

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00:24:59.300 --> 00:25:01.160

Stephanie Bogan: Travis welcome.

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00:25:02.130 --> 00:25:08.930

Travis Poodiack: Thank you. and an inform of day. so my name is Travis Pudiac. I'm the

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00:25:09.000 --> 00:25:13.470

Travis Poodiack: jin to you know, as the the senior on the team.

167

00:25:13.670 --> 00:25:20.680

Travis Poodiack: I think the original question that was posed was, what has my attention for this year?

168

00:25:21.010 --> 00:25:23.339

Travis Poodiack: A couple of different things?

169

00:25:23.640 --> 00:25:27.270

Travis Poodiack: I think one of the biggest is kind of.



170
00:25:27.380 --> 00:25:30.310
Travis Poodiack: you know, transitioning the firm to that independence.

171
00:25:30.530 --> 00:25:33.749
Travis Poodiack: but at the same time wanting to

172
00:25:33.790 --> 00:25:39.809
Travis Poodiack: reinvent a lot of the core elements of of how we work with our clients.

173
00:25:40.040 --> 00:25:48.649
Travis Poodiack: which I think is a good way to maximize that transition where it's actually like. Oh, no, this is a very different thing

174
00:25:48.920 --> 00:25:55.830
Travis Poodiack: and then i'm more personally like I'm. In the throes of studying for my Cfp. I supported March. So that's

175
00:25:56.120 --> 00:25:58.060
Travis Poodiack: you know, a lot of the other

176
00:25:58.100 --> 00:26:00.799
Travis Poodiack: elements of my time. So i'm excited for

177
00:26:01.090 --> 00:26:02.399
Travis Poodiack: for this year.

178
00:26:02.550 --> 00:26:04.710
Stephanie Bogan: So what you're saying is, you're really busy right now.

179
00:26:04.970 --> 00:26:06.940
Travis Poodiack: Yes, yes.

180
00:26:07.450 --> 00:26:09.320
Stephanie Bogan: Ryan, welcome.

181
00:26:13.970 --> 00:26:18.499
Stephanie Bogan: I think Ryan is actually talking to someone right now. John. Oh, sorry! There you go

182
00:26:18.870 --> 00:26:32.220



RyanWyatt: muted. Sorry so, Ryan. Why, this is my first year in the program. also agenda. My father's on this call as well out of Pittsburgh, Pennsylvania, With true well design, and our company name

183

00:26:32.810 --> 00:26:34.509

RyanWyatt: what originally

184

00:26:34.690 --> 00:26:38.109

RyanWyatt: attracted me, or I should say us to the program is.

185

00:26:38.130 --> 00:26:42.880

RyanWyatt: you know, we both left the broker dealer space at the same time basically to work together.

186

00:26:43.130 --> 00:26:51.219

RyanWyatt: and now we want to kind of grow as rapidly as possible, but have a good foundation under us to do that. We're just, you know, kind of hitting some

187

00:26:52.750 --> 00:26:55.389

RyanWyatt: some troublesome areas, I should say

188

00:26:55.860 --> 00:26:57.240

RyanWyatt: And then

189

00:26:58.230 --> 00:27:11.499

Stephanie Bogan: lost my last train of thought. I don't know if there's another question. I should address.

190

00:27:11.720 --> 00:27:12.710

Stephanie Bogan: John.

191

00:27:14.640 --> 00:27:17.340

John A. Rojas, CFP®, CDFA®: Hello! We can.

192

00:27:17.730 --> 00:27:24.659

John A. Rojas, CFP®, CDFA®: just to give you an idea what my life has been like the last 5 years. About 5 practices got married.

193

00:27:24.820 --> 00:27:29.209

John A. Rojas, CFP®, CDFA®: I had 2 children, 1, 2, and a half years old, 1 6 months

194



00:27:29.470 --> 00:27:30.599
John A. Rojas, CFP®, CDFA®: got a puppy

195

00:27:31.020 --> 00:27:35.160
John A. Rojas, CFP®, CDFA®: transition from an air prize over to independent world.

196

00:27:35.670 --> 00:27:39.990
Stephanie Bogan: So John is an underachiever. Everyone needs to take note right now.

197

00:27:40.060 --> 00:27:46.600
John A. Rojas, CFP®, CDFA®: It was. It was a lot. In a short period of time. I would not recommend buying 5 practices in in 6 months.

198

00:27:46.720 --> 00:27:49.870
John A. Rojas, CFP®, CDFA®: But really, the reason why I'm here.

199

00:27:50.790 --> 00:27:57.770
John A. Rojas, CFP®, CDFA®: The main reason is that I was a W. 2 employee for 24, year, 26 years as a financial advisor

200

00:27:57.820 --> 00:28:00.749
John A. Rojas, CFP®, CDFA®: and the independent Channel. I love it. It's great.

201

00:28:01.250 --> 00:28:04.039
John A. Rojas, CFP®, CDFA®: I love the independence of it just

202

00:28:04.450 --> 00:28:07.649
John A. Rojas, CFP®, CDFA®: not the politics and everything that goes with other firms.

203

00:28:07.730 --> 00:28:17.559
John A. Rojas, CFP®, CDFA®: But I realized, like I've been a sole practice practitioner for so long. I really don't know how to run and scale business, and so I've got an amazing team. They come to work

204

00:28:17.590 --> 00:28:24.079
John A. Rojas, CFP®, CDFA®: ready to work hard and give the heart to the business. And so I want to build an actual, sustainable, scalable business

205

00:28:24.130 --> 00:28:34.539



John A. Rojas, CFP®, CDFA®: that allows me to to live in Costa Rica, probably about 4 or 5 months out of the year, because, like Stephanie. I'd either want to be on the mountain or on a serp work.

206

00:28:35.600 --> 00:28:43.259

Stephanie Bogan: I want to be on a surfboard, too. I just spent a lot more of my time in the water.

207

00:28:43.330 --> 00:28:44.430

John A. Rojas, CFP®, CDFA®: for sure.

208

00:28:44.470 --> 00:28:50.620

Stephanie Bogan: I'm much more secure on skis than I am this report. But but, hey, you gotta keep trying right. You can't give up

209

00:28:50.830 --> 00:28:51.780

John A. Rojas, CFP®, CDFA®: for sure

210

00:28:52.090 --> 00:28:53.640

Stephanie Bogan: Joe.

211

00:28:56.730 --> 00:29:10.289

Stephanie Bogan: Fun. Fact about Joe is that he is our own personal whiskey, Small yag, he's legit whiskey small. You like news all about it's really awesome. So I don't know if you were going to share that, Joe. But you know we just gotta.

212

00:29:10.710 --> 00:29:16.049

Joseph M. Van Name, CFP®, AIFA®: I'm also spending half the time in this call working on a whiskey auction that i'm bidding on some whisky right now. So

213

00:29:17.410 --> 00:29:24.959

Joseph M. Van Name, CFP®, AIFA®: I got out bit on one, but I might be winning 4 others. So I'm: okay. So we have a problem with that. Tell me you have a problem.

214

00:29:25.010 --> 00:29:33.960

Adam Cmejla, CFP®: What's that? Nothing. I'm just kidding. I've got lots of problems with whiskey, that's all. I'm. I'm right there with the I'd be been against you if I knew where you were

215

00:29:34.840 --> 00:29:38.260

Joseph M. Van Name, CFP®, AIFA®: my own advisors. Financial. We're in



216

00:29:38.430 --> 00:29:42.989

Joseph M. Van Name, CFP®, AIFA®: license Virginia, just outside DC. Spend most of my time on the east coast of Maryland.

217

00:29:43.160 --> 00:29:48.080

Joseph M. Van Name, CFP®, AIFA®: joined the firm in 2,001 bought out the founder in 2,007,

218

00:29:48.140 --> 00:29:51.990

Joseph M. Van Name, CFP®, AIFA®: like all good financial moves buying a firm in the summer of 2,007,

219

00:29:52.210 --> 00:29:54.579

Joseph M. Van Name, CFP®, AIFA®: so I've had the firm for the last

220

00:29:54.730 --> 00:30:04.539

Joseph M. Van Name, CFP®, AIFA®: 1516 years. and we just need to take it to the next level or decide what's going to happen. So trying to get things going and focusing my attention on the firm that I've spent

221

00:30:04.590 --> 00:30:06.990

Joseph M. Van Name, CFP®, AIFA®: a little too much time being very casual, with

222

00:30:07.020 --> 00:30:08.799

Stephanie Bogan: sounds awesome. Great

223

00:30:09.050 --> 00:30:12.909

Stephanie Bogan: Welcome back, Joe. Robert! Hi! Nice to see you this year.

224

00:30:13.230 --> 00:30:17.169

Robert Hansen, CFP®: Yeah, Good. Seeing you again, and good seeing everyone

225

00:30:17.320 --> 00:30:22.810

Robert Hansen, CFP®: happy to be back this year, like Stephanie said. It's my second year, but my first year in leaders

226

00:30:22.910 --> 00:30:27.949

Robert Hansen, CFP®: don't know if you can see the similarity names, but kind of like Ryan. i'm here with my dad.

227

00:30:28.010 --> 00:30:32.209



Robert Hansen, CFP®: So Chris has been a part of limitless for a handful of years now. And

228

00:30:32.310 --> 00:30:35.659

Robert Hansen, CFP®: yeah, just really excited to be a part of the program. I know

229

00:30:35.680 --> 00:30:42.140

Robert Hansen, CFP®: Chris hit on it a little bit, but we've been growing rapidly this last year, specifically

230

00:30:42.170 --> 00:30:54.769

Robert Hansen, CFP®: and limitless, I would say, is the main reason we've stayed above water. but i'd love to get to the point where I don't feel like i'm drowning anymore, and maybe thriving instead of surviving. So that's why I'm just really excited to be a part of this, and

231

00:30:55.070 --> 00:30:58.219

Robert Hansen, CFP®: again get a better foundation underneath us.

232

00:30:58.300 --> 00:30:59.670

Stephanie Bogan: Awesome. That's Great

233

00:30:59.760 --> 00:31:01.419

Stephanie Bogan: Mary! Welcome back!

234

00:31:02.130 --> 00:31:09.349

Mary McCafferty: Hello! Thank you. Yes, I'm Mary Mccafferty and I'm I guess you'd say a co-leader with Dave Virgio who is also on this call.

235

00:31:09.430 --> 00:31:11.279

Mary McCafferty: and we're in Buffalo, New York.

236

00:31:11.810 --> 00:31:22.310

Mary McCafferty: This is my second year in the program, and my goal for this year is to really really embrace those most important lessons that I learned last year and keep moving forward.

237

00:31:22.830 --> 00:31:31.410

Stephanie Bogan: That's awesome. The level up right? Sometimes you gotta spend time listening and learning, and then you can really lean into it when she won't. Get that grounding.

238

00:31:31.640 --> 00:31:33.410



Stephanie Bogan: Andrew. Welcome

239

00:31:34.930 --> 00:31:37.030

Andrew Rosman: on, mute. Everyone can hear me.

240

00:31:37.770 --> 00:31:43.679

Andrew Rosman: Okay, so i'm Andrew Rossman. I'm a Lionel's partner. We we left Wells Fargo

241

00:31:43.820 --> 00:31:49.259

Andrew Rosman: for bleakly. it's an R. A. And New Jersey we work here in

242

00:31:49.420 --> 00:32:05.809

Andrew Rosman: basically When we left. Wells Fargo. We pretty much eliminated our entire transactional business. and we kind of left all our papers behind. So we gotta have this blank slate to really build a great financial planning practice, which is kind of what I always wanted to

243

00:32:05.820 --> 00:32:13.440

Andrew Rosman: as far to do. And honestly, we we heard Stephanie talk, and I was like we should hire our I was like, are you sure? And I was like, what's our

244

00:32:13.650 --> 00:32:14.970

Andrew Rosman: so, Stephanie?

245

00:32:15.070 --> 00:32:19.279

Stephanie Bogan: I will, man, we are here for you. We are here for you.

246

00:32:19.480 --> 00:32:22.060

Andrew Rosman: It's it's nice to meet you all.

247

00:32:22.200 --> 00:32:23.139

It's a pleasure.

248

00:32:23.180 --> 00:32:26.250

Stephanie Bogan: Dave Junior, Are you in national, yet, man?

249

00:32:27.930 --> 00:32:44.489

DMB: Sorry. What was that. Am I? What I said? Are you in Nashville yet? When's the reload happening? No, but we've been talking about how we need to get back right? We? We we're hoping that's one of the troops here. But i'm not sure. The group of us may have found the really awesome country honky to get last year's national Retreat, and



250

00:32:44.500 --> 00:32:53.039

Stephanie Bogan: Dave, Jr. We were having so much fun that Dave, Jr. Was like, i'm moving here, and I looked at Dave senior, and i'm like i'm sorry he's like. No, I might move with him so much fun.

251

00:32:54.630 --> 00:33:02.759

DMB: He's still talking about buying a house there this day. So no, thank you. Thank you. Yeah, I

252

00:33:02.780 --> 00:33:15.539

DMB: What do you want me to say? My goals? I mean, Michael really is just to absorb as much knowledge as all these experience advisors as as I can. I mean it was kind of my goal last year, and it's the same thing with this i'm still studying for the Cf.

253

00:33:17.650 --> 00:33:18.370

Awesome.

254

00:33:22.620 --> 00:33:25.800

DMB: and i'm getting my enrolled.

255

00:33:26.010 --> 00:33:28.020

Stephanie Bogan: Well, great glad to have you back this year

256

00:33:28.120 --> 00:33:31.500

DMB: and Matt, I can't see you, but i'm hoping that you're there.

257

00:33:34.100 --> 00:33:46.100

Stephanie Bogan: Yup. I think that's Matt thing and Chat saying he is having some technical difficulties with his camera. All right, he says. What has our attention for the year is building a business that has the correct processes and features in place to serve clients and facilitate growth.

258

00:33:46.110 --> 00:33:58.199

Stephanie Bogan: young and hungry. But it's just the goals for the year and excited to be here. That is good. We love big goals, not because more is better, but because they're what inspire you right there what call you? And we want to help sit in that space of helping you create that?

259

00:33:58.230 --> 00:34:03.600

Stephanie Bogan: so let's do a quick run through. I think I need to go back to sharing my 3 screen. Actually.



260
00:34:04.820 --> 00:34:08.100
Stephanie Bogan: watch this. Let's do our little technical test here.

261
00:34:09.690 --> 00:34:13.579
Stephanie Bogan: I'm gonna share my screen. I'm gonna choose display number.

262
00:34:13.850 --> 00:34:17.149
Stephanie Bogan: Where are the numbers display? Number one? I'm gonna hit share.

263
00:34:18.239 --> 00:34:19.520
Stephanie Bogan: I do this.

264
00:34:20.860 --> 00:34:21.839
Stephanie Bogan: Did it work.

265
00:34:23.590 --> 00:34:35.160
Stephanie Bogan: Got 2023 is really going to be the best year ever I have mastered zoom technology. Yeah, if you were here next year, it's a 50 50 chance that I was ever going to work in any of the day.

266
00:34:35.250 --> 00:34:42.419
Stephanie Bogan: All right. We've talked a lot about this by freedoms. You're really here to bridge the Behavior Gap the practice. You have

267
00:34:42.530 --> 00:34:53.209
Stephanie Bogan: the practice you want. We're sitting together in that space between those 2 things, and that is ultimately the roadmap for change, and that's what you're here For what are those proven practices?

268
00:34:53.219 --> 00:35:11.989
Stephanie Bogan: How do I apply them? In a way whether you're the first generation? The next generation scaling grows succeeding, preparing to sell like, what are the things that are really the characteristics of those quality organizations? What are the characteristics of quality, leaders, and right? What are the mindset of methods that we can use to create new levels of success

269
00:35:12.010 --> 00:35:15.399
Stephanie Bogan: without sacrificing our time and freedom to enjoy it.

270
00:35:15.820 --> 00:35:35.680



Stephanie Bogan: And you talked about it often feels a whole lot like a roller coaster ride. we're gonna help smooth that out this year, but it's still gonna be a bit of a ride, right? You're gonna have highs. You're gonna have lows. Our job is to engage and support you. Your job is to engage us and ask for that support so that we're in a good position to go through that this year.

271

00:35:35.820 --> 00:35:40.539

Stephanie Bogan: tiff. Jared, do you want to talk a little bit about sort of our learning model here at limitless.

272

00:35:40.710 --> 00:35:59.769

Tiffany Charles: Yeah. So we have the mastery of the 4 M's: so we start with mindset. Go into mapping methods and momentum. We very intentionally do it in that order. If you are not taking a breath and ensuring that you understand why

273

00:35:59.780 --> 00:36:28.610

Tiffany Charles: the issues that we face with the challenges or opportunities are what they are, and for what reason? then we could be spending a lot of time, energy, and capital on things that don't move the needle for us. so we take a big practice in checking in with self checking in Why, things may be triggering. Why, we're working on the how before we went into the why and then we create the vision has to be clear. If again if the vision is unclear. We spend a lot of time wrestling with the wrong things.

274

00:36:28.730 --> 00:36:48.550

Tiffany Charles: but once we have mindset and mapping, then we just get into the how, and then we get all of those folks on a wheel, and that momentum starts. I used to have this like feeling when I came into limitless like it was this: like pushing the wagon like behind you like just the one person, you know, like pulling it up. And now, having a team of 14

275

00:36:48.560 --> 00:36:59.520

Tiffany Charles: that is just like pushing that right up the mountain, while everyone's very clearly in their seats know exactly the 2 to 3 things they need to focus on for us to do really really well, as a firm

276

00:36:59.530 --> 00:37:15.379

Tiffany Charles: is a huge win. And so, following all of this, and and you know this is a cycle like new things, Trigger, and we gotta get clear on it before we take those next steps. We gotta take in the new information. so that's what we practice here at limitless. All of our journeys are going to be in different places.

277

00:37:15.390 --> 00:37:24.549



Tiffany Charles: we're gonna get mindset not being clear first. but where we could be on methods or momentum is something that limitless is so great about very like

278

00:37:24.680 --> 00:37:30.120

Tiffany Charles: very much personally reaching you there so super excited about 2023, and working with all of you.

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00:37:30.410 --> 00:37:32.030

Jarrod Musick: Awesome. Thank you.

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00:37:32.230 --> 00:37:38.479

Jarrod Musick: And I think it's super important to recognize that you know for everybody who is new to the program.

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00:37:38.490 --> 00:38:07.750

Jarrod Musick: Everything that you're going to get has been tested. It's been run through actual advisory firms, practices that have scaled into, you know, larger entrepreneur enterprise level organization. So there really is no question that you're going to ask or problem that you're going to run into that somebody who's either part of the limitless staff, or you know the advisor coaches or somebody in your peer group hasn't already dealt with.

282

00:38:07.800 --> 00:38:37.790

Jarrod Musick: so Don't hesitate to reach out about anything. And then all of the curriculum material that you're going to go through the retreats and the lessons and everything that we're working on really has been refined here over the course of the last 4 or 5 years, and is highly effective, so use what's there? Reach out to the coaches reach out to everyone else in the program to get your questions answered. And then also, you know, rely on the accountability. We're here to help each other, elevate and

283

00:38:37.800 --> 00:38:49.279

Jarrod Musick: get where we all want to go. so lean into that. The more that you put into this community, the more you're going to get out of it and really take what you're learning here and apply it inside your practice.

284

00:38:50.400 --> 00:39:08.819

Stephanie Bogan: Yeah, talk is cheap and coaching isn't. So we want to make sure right that we're really investing and getting that roi like it's our objective just as much as it's yours. we're gonna go through. I'll walk through the process in just a moment. Have you on our call earlier, right through the Coaching Guide? Mat, we're gonna really assess where your practice is



285

00:39:08.830 --> 00:39:15.889

Stephanie Bogan: over the course of the month. Right? Have that communication and conversation with you about where we want to focus your energy this year.

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00:39:15.910 --> 00:39:23.249

Stephanie Bogan: We're going to focus that through 4 in your case, 5 for treats, right performance, value, productivity, and growth, each of them have

287

00:39:23.280 --> 00:39:42.350

Stephanie Bogan: right. A series of lessons contain within them. And then our leaders retreat in May is leaders only. We're going to go off right to some really awesome place. Have great adventures and conversations that are really expansive and really elevate us as we hit the rest of the year. so that's kind of where we'll do our core, learning together as a group.

288

00:39:42.440 --> 00:39:46.170

Stephanie Bogan: these are those learning journeys that will go on. This is the track.

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00:39:46.180 --> 00:40:02.489

Stephanie Bogan: The the limitless course sets right. Lifestyles going through this in a group format. You and your teams have full access to that track so you can. We'll work with you to design that roadmap. You can go in to certain lessons or areas where you need to do work and right sort of backfill in certain areas.

290

00:40:02.670 --> 00:40:12.409

Stephanie Bogan: So you have that track to run on. But in leaders you have a lot more latitude to choose your own adventure, and really customize that path in terms of the work that we do with you directly.

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00:40:12.850 --> 00:40:15.040

Stephanie Bogan: So Lauren and I will have her first

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00:40:15.050 --> 00:40:34.030

Stephanie Bogan: roadmap call with you over the next couple of weeks. what is today, Monday. So this week in next week. and we'll really assess where the practice is. We're gonna go through the practice. 3, 60 work on what we call your guide map with you when you think of the core lessons that you ultimately want to rate, check off to build that really awesome business.

293

00:40:34.040 --> 00:41:03.240



Stephanie Bogan: we'll help you prioritize those, and then we'll ultimately help you transition those into a coaching plan for the year, and then get clear with you about where you and your team should spend time at that March retreat. Hey, John! It makes perfect sense to have the team right. Listen to this, you know. Watch this lesson from the virtual retreat. right. You can re- regroup with them on that when you get back. Hey? This is really important. You guys you know. Go watch this in the library so that your team can get really grounded, and you guys can start to take action around that.

294

00:41:03.400 --> 00:41:17.150

Stephanie Bogan: and that should all ultimately translate into your one page business plan, which is that roadmap for the year that make sure that you're clear. Your actions are aligned with the vision that you set out. You're going to learn. There's a lot we do to create resistance

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00:41:17.300 --> 00:41:29.890

Stephanie Bogan: and drag, if you will, and that we're then creating accountability for those prior priorities. Not anymore. It's just right, you know, a so low driven founder. But now, at a professional level, how do we bring that management discipline

296

00:41:30.000 --> 00:41:35.250

Stephanie Bogan: to our organizations to sell that growth and create those succession and right those value opportunities.

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00:41:35.600 --> 00:41:37.639

Stephanie Bogan: So in between those retreats

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00:41:37.650 --> 00:41:59.749

Stephanie Bogan: you guys have probably heard this few a few times in a few emails. By now we'll have our monthly practice development call. Ours will be leaders specific. So your teams you're welcome to join the lifestyle calls Will. Obviously smaller group be able to get much deeper in our leaders calls. The personal Development call is open to everyone. So that's where we're going to dive into, You know. Accountability.

299

00:41:59.790 --> 00:42:07.210

Stephanie Bogan: you know, mindset those personal leadership growth, you know. Clarity, the the things that show up for us personally.

300

00:42:07.320 --> 00:42:18.830

Stephanie Bogan: And then, we have a a leaders office hours which is open conversation, so we can dive into those practices. We can dive into those personal issues at just with our leaders group.

301

00:42:18.960 --> 00:42:35.060



Stephanie Bogan: We have weekly office hours which your teams are welcome to avail themselves of. You are welcome to as well if you want to drop in and talk with Liz or Lauren? You're also leaders. So if there's something that you want support on, you simply reach out to us. We'll check in with you and make sure that you get it.

302

00:42:35.070 --> 00:42:48.409

Stephanie Bogan: So again, good Vibes tribe is there for you and your teams coaching past. So right you'll have those quarterly calls with me every quarter. Lauren will be in on our first call together, and then she'll be checking in with you in the months between

303

00:42:48.450 --> 00:42:49.649

Stephanie Bogan: Hey, Lyle?

304

00:42:49.690 --> 00:42:57.719

Stephanie Bogan: How's it going on those next steps? Is there anything we can support you on, hey? Could you take a look at this and tell me what you think. Actually, this looks pretty good. But.

305

00:42:57.830 --> 00:43:22.370

Stephanie Bogan: hey, when it comes to this red tail thing like you should probably talk to Adam because he knows that system cold. Okay, let's get this. Get you a quick call with Adam this quarter. Okay, Great thanks. Hey? You should probably talk to me about. So we'll really work with you. Think of like the conductor at Grand Central Station to say, hey, where is it that you want to go this year You're right. You're climbing, Everest. But what trailer you on? And who is the guide that's best suited to meet you where you are

306

00:43:22.500 --> 00:43:24.159

Stephanie Bogan: as you go through that journey.

307

00:43:24.570 --> 00:43:40.209

Stephanie Bogan: So that's what we'll do with you in the Quarterly calls will be working with you to set that strategy, Lauren I. And the coaching team will work. Be working with you in the months between depending on the claim that you're on to help you tackle those a focus priority. Each quarters that we can really dig in.

308

00:43:40.290 --> 00:43:48.479

Stephanie Bogan: Isaac, who is with us again this year, but not on the call today. for example, really, what's been working on his sales process for the last 6 months.

309

00:43:48.570 --> 00:43:58.270



Stephanie Bogan: So that was his focus project. So he recorded his sales process. He sent them in. I gave his team feedback. We had a team training call to really walk them through how the sales process should really work in their firm.

310

00:43:58.380 --> 00:44:03.250

Stephanie Bogan: right? So that was the priority. He wanted our support to really be focused around that quarter.

311

00:44:03.340 --> 00:44:14.169

Stephanie Bogan: So what we'll do is go through a process to help you build that roadmap. Your team again as we talked about, can join any of those lifestyle calls They're welcome to any time.

312

00:44:14.280 --> 00:44:27.810

Stephanie Bogan: Leaders calls are preserved for leaders and Co. Members. We're going to have a lot of open, honest, real conversations, right? So we want to make sure that we have a Peer Group. that's really in this together. But your teams are welcome to join any of those lifestyle Calls

313

00:44:28.320 --> 00:44:49.679

Stephanie Bogan: your trail map for the next quarter is to work on those base camp learning paths right to make sure you've got drafts of the vision and the plans and the the time right so we can make sure that when we have our roadmap call with you we can dive into those conversations. So we'll have her performance retreat on the 20 third. So over the next 2 weeks Lauren and I will be holding those calls with you

314

00:44:49.690 --> 00:44:54.700

Stephanie Bogan: to get clear on your vision, your priorities and your plans and priorities for the year.

315

00:44:54.920 --> 00:45:11.399

Stephanie Bogan: we'll do lifestyle calls will be happening not really applicable to you. Guys lifestyle will be happening after the January 20 third retreat. Your first mastermind call for, all of you will be on February sixth, and I think you actually have to reset that one, because it's a holiday.

316

00:45:11.490 --> 00:45:30.270

Stephanie Bogan: and our focus. January and February all the way up to that March retreat is going to be to implement apply those base camp lessons. Are you really turning that vision into right actions and strategies that are going to make it happen? Are you really managing your time? So we're going to do a success for it in February, on high performance, habits

317



00:45:30.280 --> 00:45:49.249

Stephanie Bogan: and happiness right to really go through a 30 day Success for it, as we like to call it here to really search a great anchor. Those habits together as a group that, you and your team will have the opportunity to participate in, and before you know it it will be March sixth, and we will be getting together in New Orleans, and then all bets are off, because right

318

00:45:49.260 --> 00:46:03.450

Stephanie Bogan: there's just gonna be just a lot of opportunity for you to then get clear and focused about how you want to engage those priorities over the next quarter, and again we'll go through that in our roadmap call with you. Set the roadmap for the next quarter, and kick into gear.

319

00:46:04.050 --> 00:46:10.419

Stephanie Bogan: so that's this is essentially what it will look like. We're gonna help you set out the guide map for what we want to cover

320

00:46:10.500 --> 00:46:26.859

Stephanie Bogan: Help You come up with a quarterly plan that will focus us and you on our coaching support over the course of that quarter. You're gonna build a one-page plan that ultimately sets your priorities for the year. And then both we, as a team and the library, right resources, shortcut strategies

321

00:46:26.870 --> 00:46:33.259

Stephanie Bogan: those lessons and all the resources that come with them are going to be there in the library to support you and your team as you go through that process.

322

00:46:33.310 --> 00:46:40.019

Stephanie Bogan: and any time again. You need help getting clear. And what lessons are priorities? Right? Just reach out to Lauren and she'll make sure that we're here to help you.

323

00:46:40.080 --> 00:46:54.329

Stephanie Bogan: Stop doing that, Pas. Go. Do not collect your \$200, or any awesomeness this year, unless you have completed your enrollment form, added us to safe centers and made a note. We are going to send you an inbox insights every Other Week.

324

00:46:54.470 --> 00:47:00.890

Stephanie Bogan: We are not going to endate you with a bunch of clutter. That's our commitment to you. Your commitment back as you need to read those.

325



00:47:01.120 --> 00:47:13.369

Stephanie Bogan: It is not junk mail. It contains pre work. It contains coaching videos. It can say it's like, hey, here's a cool tip. We want you to think about taking advantage of this week, right? So just take a few minutes when you see those in your inbox.

326

00:47:13.490 --> 00:47:16.179

Stephanie Bogan: and make sure you're working on your base camp lessons?

327

00:47:16.330 --> 00:47:17.799

Stephanie Bogan: Any questions.

328

00:47:20.170 --> 00:47:22.969

Stephanie Bogan: Are you overwhelmed with administrative?

329

00:47:23.930 --> 00:47:39.720

Stephanie Bogan: There's a test. How much of that will you actually remember? only about 20% of it, according to the science? if you quick question around retreat. If you are a first year member, we recommend that you attend all of Retreat week.

330

00:47:39.740 --> 00:47:47.509

Stephanie Bogan: So the 2 days of lifestyle, so that you can get really grounded. You can definitely do that virtually. If you want to do that or pick, we can talk through the lessons.

331

00:47:47.520 --> 00:48:03.699

Stephanie Bogan: If it's a time issue that are most relevant. But you're going to get a lot out of being there in person and really soaking it up. Your team is going to be watching it Virtually you're going to come back. People are going to be really aligned. so for any reason you can't let us know, and we'll work with you to prioritize what you should be watching.

332

00:48:03.710 --> 00:48:20.989

Stephanie Bogan: but in the ideal for your first year I know a lot of the second year alumni will come for a good chunk of it. but you're also welcome to come for those right, for the actual leaders retreats. If you don't need to attend those first 2 days. So if you want to send someone from your team and your place for that, let us know. we're happy to let you.

333

00:48:21.000 --> 00:48:25.060

Stephanie Bogan: if you want to let them attend the lifestyle part in person, and you want to join us for leaders.

334

00:48:25.480 --> 00:48:44.630



Stephanie Bogan: So again, as you have questions about your team and how they participate. Do not hesitate to reach out to us. I'm gonna have Allison send you the video with the walkthrough on a tribe that she did is about 7 or 8 min. that'll take you through that, if you've got any questions about the website or how to use it.

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00:48:44.640 --> 00:48:50.629

Stephanie Bogan: Please reach out to Allison, and she will be more than happy to walk you through that if you need any personal support.

336

00:48:51.220 --> 00:49:04.500

Stephanie Bogan: Those are just screenshots in case the technology doesn't work welcome package you should have, or will soon be, receiving your welcome package from limitless, which should be your big wall Calendar your post. It's your party. Horn. Did anyone bring the party on today?

337

00:49:05.320 --> 00:49:24.380

Stephanie Bogan: Winter, winter, chicken, dinner, Lyle is committed the hardest thing that many of us do is celebrate our successes, tuning our own horn some of this really struggled to to other people's horns. So it's a theme this year that we're really going to engage and celebrate and have fun as we create these new levels of success.

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00:49:24.390 --> 00:49:33.249

Stephanie Bogan: so remember to stay clear and stay focused right. Time. Vision does account unless it shows up in your calendar and your time, which we're going to talk a lot about

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00:49:33.270 --> 00:49:45.409

Stephanie Bogan: in our retreat on the twenty-threer. We're gonna workshop both get show and tell from the advisory coaches in terms of how they've applied those lessons. So you could really see rate those ideas in action.

340

00:49:45.420 --> 00:50:04.950

Stephanie Bogan: and then do pure workshops around how you're applying that to help you get more clarity and confidence as you go forward. and then you'll be implementing from there again. We'll be here to support you if you need anything and then our roadmap call will help you define where you want to spend your time in that large retreat, and where you want to have your team participate as well.

341

00:50:05.910 --> 00:50:19.750

Stephanie Bogan: the biggest, cool thing about limitless. It is unbridled opportunity. Almost anything you need want have, I think, the firms we've consulted with. I think the largest, you know, if you get past 250 million dollars in revenue.

342



00:50:19.760 --> 00:50:30.600

Stephanie Bogan: we might have to check ourselves up to that point. We're pretty good at right, defining, scaling, selling, adding, you know, buying 150 firms, integrating them like we've been there and done that.

343

00:50:30.620 --> 00:50:37.580

Stephanie Bogan: What it's really about for me at this point is, how do we create great a new generation of founders

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00:50:37.730 --> 00:50:54.580

Stephanie Bogan: that are really empowered to, not just create success in their businesses, but create success in their personal lives. Rule number one to success is you have to get clear. You have to take a line to action, Rule number 2, and you have to be accountable. So rule number one. Here is Don't. Get overwhelmed. It's easy. We're giving you

345

00:50:54.600 --> 00:51:02.789

Stephanie Bogan: right. A bachelor's in a master's program and running an awesome business in the course of 12 months. You're not going to absorb it All you don't need to.

346

00:51:02.920 --> 00:51:08.129

Stephanie Bogan: Your job is to get clear about what are the leverage you need to pull this year, Lyle Joe.

347

00:51:08.410 --> 00:51:18.909

Stephanie Bogan: Right, John Ryan, to really create the intention and the integration. What are the steps we need to take to move the needle in the direction that we want. So you're going to get organized.

348

00:51:19.080 --> 00:51:28.769

Stephanie Bogan: and then together we're going to help you get clear, get focused and get to work on those priorities. But we're going to create the strategies and shortcuts. It's way easier than going it alone for the next 10 years.

349

00:51:29.650 --> 00:51:45.180

Stephanie Bogan: you should have this information in 19 different ways in your email inbox. But just in case, one more time we have one general inbox at limitless. It's the coaching at limitless for any general questions that you may have, or your teams may have. they will direct them there.

350

00:51:45.190 --> 00:51:55.340

Stephanie Bogan: If you have coaching questions, right good vibes, tribes. You have your own private email, which is leaders that limitless f a life.



If you're like, hey? I want to have to take a look at this. I need to chat with someone.

351

00:51:55.650 --> 00:52:14.989

Stephanie Bogan: Hey? I've got, you know. Just drop it to leaders at limitless life. You can do coaching at limitless life as well. But, if you just send to leaders, we'll go straight to your leaders, our leaders inbox and then the website is members start limitless f a life. If you want to go in and check that out. when you open up that training video, if you need help. You can go through that

352

00:52:15.950 --> 00:52:35.879

Stephanie Bogan: all right. So I'm going to Paul, and we're going to end here. But the question which we're going to bring back up in March, because our agenda includes the 5 characteristics of high quality organization and the 7 mindsets of excellent leaders managing performance. Among other things. So it's going to be a very impactful retreat agenda.

353

00:52:35.920 --> 00:52:39.700

Stephanie Bogan: And we're gonna start with this concept, which is what if you built.

354

00:52:39.810 --> 00:52:49.939

Stephanie Bogan: and what do you aspire to build. Do you have a lifestyle practice that's founder to peasant right? The the philosophy there is usually succeed in. Serve right like I'll do. I want success. I want to be nice to my clients

355

00:52:50.680 --> 00:52:58.089

Stephanie Bogan: successful firm with their founder and partner driven less, not a 100% dependent on you or your partners.

356

00:52:58.120 --> 00:53:04.339

Stephanie Bogan: but they are still driven by them. Right? You can't all step away and have this thing run on its own

357

00:53:04.450 --> 00:53:07.449

Stephanie Bogan: primary objective. Here is typically scaling growth.

358

00:53:07.570 --> 00:53:25.809

Stephanie Bogan: we tend to lose lifestyle in this phase. It's not written here, but right in limitless. It's always our priority, and the third is what I've sort of come to call an autonomous business. It has independent transferable operations. It will run consistently and reliably to the same standards, even if you're not there

359



00:53:25.990 --> 00:53:34.360

Stephanie Bogan: and transferable value, right? And in a business rate you're going to really maximize that value as you scale and grow. All of these models have value.

360

00:53:34.420 --> 00:53:58.810

Stephanie Bogan: Right? It's how you extract it over time and a lifestyle practice You're going to extract more an income typically, whereas in a firm or even in a business, you're going to reinvest more at that capital to scale growth profits rate in value. So we'll talk a lot more about that in retreat. But I just wanted to level set as we go through. Really a period of setting yourself up and the team up for personal performance and productivity. Right vision, mindset time.

361

00:53:59.010 --> 00:54:05.169

Stephanie Bogan: Those are the foundations of all successful leaders of entrepreneurs, irrespective of their industry or profession.

362

00:54:05.300 --> 00:54:20.459

Stephanie Bogan: that clarity of mindset right, it being in that inspired, empowered state, having a clear and compelling vision that calls to us, and really aligning our time rate attention in ways that will actually create that reality for us.

363

00:54:20.750 --> 00:54:35.370

Stephanie Bogan: So that's why we start in January and February, and really steeping us in those strategies for personal success. And then we hit the March retreat. We'll right. We'll go through the lifestyle track right as we climb the mountain. And then in our leaders retreat we're going to really shift gears

364

00:54:35.460 --> 00:54:51.680

Stephanie Bogan: and talked expansively and strategically about. What is that you're trying to build, and we're going to dive into some really cool conversations about how you can start to take action in specific areas, leadership, managing performance, etc. so that is what's on our agenda for March.

