

LIMITLESS Coaching Call Transcript

JANUARY 9TH, 2023
LIFESTYLE KICK OFF

207

00:26:33.760 --> 00:26:39.150

Stephanie Bogan: all right. There's a theme song, if ever there was one for today's conversation

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00:26:41.300 --> 00:26:44.849

Stephanie Bogan: we're in bidding you all as fast as our fingers will allow.

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00:26:46.020 --> 00:26:51.559

Stephanie Bogan: he's feeling unstoppable. Today we have kicked off the New Year. My thing is clicking ahead

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00:26:54.820 --> 00:26:57.579

Stephanie Bogan: all right. Admit, admit. Admit

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00:27:01.950 --> 00:27:09.219

Stephanie Bogan: always good to have a coughing fit. As you can really non-event up until this exact second

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00:27:09.280 --> 00:27:24.019

Stephanie Bogan: we're going to do a nice pause for Allison's video right now, because she's going to be like you didn't get all right. Everyone pause and smile.

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00:27:26.660 --> 00:27:28.370

Stephanie Bogan: Welcome everyone

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00:27:28.640 --> 00:27:34.029

Stephanie Bogan: to the lifestyle class of 2023! Kick off. I and the team could not be more excited

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00:27:34.090 --> 00:27:42.060

Stephanie Bogan: about getting with you today, and really spending time talking about how to make the most of limitless in 2023

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00:27:42.610 --> 00:27:45.869



Stephanie Bogan: before we dive in to the gearing.

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00:27:45.940 --> 00:27:49.859

Stephanie Bogan: I really want to talk about the why behind that work.

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00:27:49.970 --> 00:27:57.820

Stephanie Bogan: Why are you here in limitless in this program? Why are you investing your time, your energy, and your capital.

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00:27:58.260 --> 00:28:00.149

Stephanie Bogan: and to what effect.

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00:28:00.870 --> 00:28:14.539

Stephanie Bogan: And we're going to learn about you and your specific situations and goals and dreams and possibilities and challenges over the course of the year. But what I know is true about each and every one of you at this moment

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00:28:14.550 --> 00:28:21.449

Stephanie Bogan: is that you're here to create your definition of success, whatever that means to you

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00:28:21.600 --> 00:28:28.529

Stephanie Bogan: beyond just economics in terms of impact and influence, and how you want to spend your time, and how you want to feel

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00:28:28.660 --> 00:28:34.610

Stephanie Bogan: and how you want to show up as a human, an advisor, a leader, a spouse, a parent, a community member.

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00:28:34.880 --> 00:28:39.539

Stephanie Bogan: So take 20 s to breathe, which we're going to do a lot of this year.

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Stephanie Bogan: We'll talk about that a lot more in the next couple of weeks.

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00:28:43.130 --> 00:28:51.330

Stephanie Bogan: But I want you to take just a moment, and we're all excited. We're ready to go. But let's sit in a space a pause and reflection for 20 s

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00:28:51.480 --> 00:28:54.449



Stephanie Bogan: and get really clear on Why, you're here.

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00:29:02.910 --> 00:29:17.409

Stephanie Bogan: Alright, If you want to drop that in the chat, you are absolutely welcome to do it. Why are you here in limitless? Let us let your peers know. What is it the year to create? What is that next level of success looks like for you personally and professionally?

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00:29:18.070 --> 00:29:21.870

Stephanie Bogan: Michelle super excited to be here. Darren wants to grow

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00:29:22.330 --> 00:29:29.849

Stephanie Bogan: growing is a very popular theme. We're going to find that we're going to grow our mindset and our methods in order to drive that grow so

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00:29:30.190 --> 00:29:39.370

Stephanie Bogan: unleash my potential create family tools and clarity, right? So a lot of really compelling meaningful goals

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00:29:39.520 --> 00:29:56.219

Stephanie Bogan: today we're gonna dive into the gearing behind the curtain, if you will, how we can help you, and how you can help yourself. Set yourself up and make the most of your limitless year. This is not the most sexy conversation that we're ever going to have.

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00:29:56.230 --> 00:30:05.579

Stephanie Bogan: but it's really the substance of how you're going to engage with us and each other, so that our time together is really well invested.

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00:30:05.590 --> 00:30:20.789

Stephanie Bogan: you're going to have questions as we go that is inevitable, so please feel free to drop them in the chat. The team and the coaches are on the line. and we'll be happy to answer as many of those as we can as we go, and we'll have time for questions at the end. So don't hesitate to drop those in there

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00:30:21.890 --> 00:30:24.000

Stephanie Bogan: with that let's begin.

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00:30:24.980 --> 00:30:44.719

Jackie Benjamin Hatherley: Hello, everyone! I'm Jackie and I join, Limitless as the new coach. After 24 years of operations management for large rias. As you can see from this slide, there is a lot of knowledge,



and know how at limitless, and we are all here to support you near success.

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00:30:44.800 --> 00:30:49.690

Jackie Benjamin Hatherley: Now, why don't we take a moment to have the team say hello and introduce themselves.

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00:30:53.850 --> 00:30:59.420

Stephanie Bogan: Oh, i'm! I'm like who's first

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00:30:59.460 --> 00:31:19.020

Stephanie Bogan: like this? Not paying attention. I am. I am your cruise director for this journey. I could not be more excited to have been inspired, to create a community and a a a set of people who are so growth minded personally and professionally to really elevate their work.

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00:31:19.030 --> 00:31:29.299

Stephanie Bogan: their wealth, and their well being together. the biggest piece of advice that I can give you with respect to limitless this year is, get utterly prepared to be uncomfortable

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00:31:29.310 --> 00:31:48.020

Stephanie Bogan: and utterly committed to working through it. We're going to talk about how we can support you in doing that. But one thing I cannot do is be in your office forcing you to pick up the phone or type that email. So remember that your job we're here with all the support that you need. Your job is to show up and take advantage of it.

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00:31:49.540 --> 00:32:05.279

Lauren Kaufman: Hi, everyone! My name is Lauren, and I will be your practice coach this year. We will all be working very closely together. So i'm really excited prior to limit limitless. I was a practice management consultant at dimensional fun advisors working with

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00:32:05.350 --> 00:32:23.149

Lauren Kaufman: advisors similar to y'all of all sizes and firm types. So really looking forward to helping you identify your priorities for the year helping you clear get focused. And my biggest advice for you all is, it is what you make it. So let's make it a great year together.

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00:32:24.210 --> 00:32:32.089

Adam Cmejla, CFP®: That's what I was gonna say, Lauren. It is what you make it. The variation of that is, you'll get out of this program which you put into it. So maybe that's a variation thing. But

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00:32:32.140 --> 00:32:42.449



Adam Cmejla, CFP®: welcome everybody so happy that you're all here Adam Schmela as the Advisor coach. One of the things that was most attractive to me about limitless way back when I joined in 2,018,

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Adam Cmejla, CFP®: was that it was a combination of best practice, and in practice in my intention, and working with the lifestyle members here within limitless, is to share with you how I have specifically taken a lot of the concepts and applications and tools that I've learned throughout the years at and limitless graduating, if you will, from a participant into now a faculty advisor coach of how we're taking a lot of these best practices, and how we've implemented those into our practice, and the success that we've seen through that process so really excited to be here and be

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00:33:10.990 --> 00:33:12.680

Adam Cmejla, CFP®: be it be a part of the community.

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00:33:14.830 --> 00:33:44.819

Jarrod Musick: And i'm Jared music just like Adam. I'm an advisor coach here. I got brought into the limitless community by my partner, Tiffany. Charles can introduce yourself in just a moment, and so we've really been a limitless participant firm here for about 4 years and have integrated a lot of the the tools and the tactics and the mindset work and so just excited to be able to share what we've learned and what we've done. Well.

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00:33:44.830 --> 00:33:59.139

Jarrod Musick: what we continue to work on, and then i'll also be working quite a bit with the leaders group. so just excited for each and every one of you taking this step to really move your practice, your business and your firm forward this year.

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Tiffany Charles: Everyone i'm Tiffany, Charles. I've been doing work pre limitless with Stephanie. we started back in 2,017 and then, when limitless, was born begged her to let me be a part of it. because I just knew there was so much to glean. And we've put limitless into practice. I've

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00:34:19.500 --> 00:34:22.500

Tiffany Charles: put it in my own life. I'm in a position that I love

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00:34:22.510 --> 00:34:51.580

Tiffany Charles: leading a company that I love. and I have a lot of time with family. i'm the mom that I want to be, and the wife that I want to be Limitless has allowed me to do that. What we're looking to do is not only be limitless as owners, but take that fully through our firm and we're looking to scale in a really big way. so everybody in Chat who wrote



growth being a big focus like that's my jam, and that's what I'm here for is to really focus in on. Where do we add growth to each one of our practices and ourselves? And I can't wait to be on this journey with you.

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00:34:54.469 --> 00:35:09.680

Liz Hand, CFP®: Hello, everyone. I'm Liz hand. I'm the mindset coach for limitless, and you'll find me in tribe at what you'll find is that here you're asking a lot of how questions and how to put things in motion for your operations or staffing.

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00:35:09.690 --> 00:35:19.169

Liz Hand, CFP®: And i'm looking at the place of how you're being about it. So i'm always focusing on you and your being, and how we can elevate you as a person.

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00:35:19.230 --> 00:35:35.660

Liz Hand, CFP®: so i'm looking forward to engaging with you on office hours, and my encouragement is to When you show up to office hours, come with a question, ready to go, and ready just to to work through it with one of the advisors and coaches that are there

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00:35:38.340 --> 00:35:52.810

Limitless Adviser: awesome. I think we'll jump to me. I am Allison folk, and i'm the program manager here at Limelight Ivan, with Stephanie for 3 years now, and I like to think that my job is to make sure that we deliver on and hopefully exceed the promises that we make to you.

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00:35:56.440 --> 00:36:13.340

Kathryn Waller: Hi, everyone, i'm. Kathryn Waller and I am so lucky to be here as the program specialist. It means I get to work with everything from content to being the creative Swiss army knife and being a data nerd and working with these wonderful people. So I enjoy integrations and serving all of you.

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00:36:15.410 --> 00:36:23.519

Leona Abrahao: Hello, My name is Leona and i'm the advisor support here, which basically, means for you, when you email coaching at limitless ffa life.

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00:36:23.620 --> 00:36:28.319

Leona Abrahao: I will triage your questions and make sure they get answered. And you are fully supported.

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00:36:31.940 --> 00:36:44.359

Stephanie Bogan: All right. That is a full and rich team of both coaches and team all here. because they care because they're committed, and they want to be a catalyst for change for you.



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00:36:44.370 --> 00:36:58.439

Stephanie Bogan: we'll also be over the course of the year by, joined by some of our alumni, who really succeeded in applying these practices the way that Adam and Tiffany and Jared had. They'll come back and share their experiences about how they applied it and support your ability to do the same.

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00:36:58.630 --> 00:37:16.649

Stephanie Bogan: They are good friends, right, Michael Kit is Julie, little child, making carpenter and more. We ran out of room on the slide. we'll be here over the course of our retreat to engage with you in small intimate settings, and really inspire you with implementable ideas that you can put into practice that really support the limitless journey that you're on.

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00:37:16.660 --> 00:37:23.489

Stephanie Bogan: so you have. I think it's Jack, you nicely set up a lot of knowledge and a lot of know how available to you.

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00:37:23.510 --> 00:37:38.410

Stephanie Bogan: You have across this team pretty much everything you need, or someone who knows how to find it to support you and your success. Your job is to really show up and engage and take advantage of that over the course of the year and the different ways that we will work with you.

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00:37:39.640 --> 00:37:55.589

Stephanie Bogan: all of that is really designed to help you create that 1 million dollar 100 day off Practice again. It doesn't have to be a 1 million dollars or a 100 days off right there's sort of benchmarks, if you will, you create your definition of success when it comes to creating your lifestyle practice.

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00:37:55.600 --> 00:38:03.640

Stephanie Bogan: What I know from working with advisors and leaders of different size and types over the last few decades is that in some way, shape or form.

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00:38:03.660 --> 00:38:18.749

Stephanie Bogan: When I was sitting on the beach in Costa Rica going, what is it all about this work thing, and how do I do it right? With that actual feeling of engagement and empowerment and enjoyment, instead of just the striving and the grinding and the the success. And I was sitting there one day, and it just struck me

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00:38:19.040 --> 00:38:35.099



Stephanie Bogan: There's really like 5 things. We want it wasn't that clear in the beginning. But I had it right. They became 5, and it was one. Gosh! You really just wanted to work with purpose on my terms. Not on everyone else's not the slaving and the obligations and the feeling like I had to when should, and the overwhelmed. I just

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00:38:35.120 --> 00:38:46.069

Stephanie Bogan: wanted to work in ways that were empowering to me on terms that really fulfilled me personally and professionally, so I could show up and do work that was impactful in my most impactful way.

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00:38:46.510 --> 00:39:00.279

Stephanie Bogan: 2, I wanted to focus on my time and energy and work that I love. We all want to do that. I wanted to work with people that I enjoyed while enjoying an abundance of financial success and writing. We do all of that. We get to live a life of happiness, full milk, and contribution

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00:39:00.430 --> 00:39:19.920

Stephanie Bogan: in some way, shape or form. These are the freedoms that we're all here to create as part of our experience together. So print this out, put it somewhere. We'll talk about ways to reflect on it over the course of the year. But what is your version of the 5 Freedoms? That's what I want you to really anchor to as you think about how you're going to bridge that behavior gap.

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00:39:20.950 --> 00:39:35.969

Adam Cmejla, CFP®: And this is the what's the phrase? What got you here? Won't? Get you there, and a variation of that is one of the things that initially and immediately attracted me to Stephanie and the work that she was doing when I heard her conversation on Michael's episode was,

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00:39:35.980 --> 00:39:44.570

Adam Cmejla, CFP®: the the repurposing of doing the same thing over and over again, but getting different results right? What did Einstein say, no problem can be solved with the same consciousness that created it.

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00:39:44.580 --> 00:40:01.770

Adam Cmejla, CFP®: So where you are right now, versus whatever vision of your ideal practice that you have understand that your one of the one of the other favorite phrases that I learned in the first year of limitless was your Why needs to be greater than your what if? And we get questions all the time from advisors in limitless about

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00:40:01.840 --> 00:40:17.259

Adam Cmejla, CFP®: Well, where do I start first? What do I do? And we'll talk about a lot of that out. That's the whole point of what today's kick off calls about. But my biggest point there is your Why needs to be



greater than what if what then? Your what if the hesitations, the reservations, the concerns and considerations that you might have.

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00:40:17.320 --> 00:40:26.659

Adam Cmejla, CFP®: and to understand that the purpose of wire here in the in the practice that you have right now there's a disconnect between what you have versus what you envision having.

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00:40:26.870 --> 00:40:38.239

Adam Cmejla, CFP®: and the path that we're going to give you is certainly one that has been tried and tested and proven by not only myself, but other advisors that are going through this that have gone through this program in the past one.

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Adam Cmejla, CFP®: but my point in all of this, I guess, is

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Adam Cmejla, CFP®: that kind of like what I said in my introduction, you'll get out of this program what you put into it, and my greatest emphasis to everybody here is to view this place as one of the greatest places of trust that you can engage in, and to know that whatever you, whatever challenge that you're facing, whatever you feel.

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Adam Cmejla, CFP®: that you have a community here that is empowering you to take steps and actions that you otherwise maybe thought weren't even possible to challenge your current status quo to challenge your current. Bs, your belief, structure, and belief system.

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Adam Cmejla, CFP®: and to help bridge that gap between what you view as possible and the vision that you have versus how you're showing up. So we're going to start from the very basics and work our way through that. But we're again. I just can't emphasize how excited we all are. We all are here to help you do this

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Stephanie Bogan: well. And, Adam, you make a really good point that I want to call out everyone's attention to which is, there will be moments of disruption and discomfort.

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Stephanie Bogan: We're gonna go through how to use the website, how to use the try where to send questions, and I promise you.

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Stephanie Bogan: I promise you there will be a moment where you sit there and go.

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00:41:54.450 --> 00:42:02.900

Stephanie Bogan: What do I have to do. I don't want to deal with that right now. I'm not a tribe person. I i'm not clear burning.

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00:42:03.150 --> 00:42:05.449

Stephanie Bogan: I'm not sure what to do next.

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00:42:05.800 --> 00:42:07.739

Stephanie Bogan: I'll just deal with this later

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00:42:07.880 --> 00:42:15.520

Stephanie Bogan: That discomfort, that unknowing is your beacon, that you are on the right path.

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00:42:15.540 --> 00:42:33.609

Stephanie Bogan: Your job is to embrace it. That's the work to figure out what the next best step is, and we'll talk now about what that support, structure and system is, so that you know where to go, and who to go to, and when to go, so that you can take advantage of the team of people who are here to support you.

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Tiffany Charles: that we do that with the 4 M's. If you like to call it the mindset mapping

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Tiffany Charles: methods and momentum, and we do it in that order. it's a really important order, because if your mindset isn't right, how do you know if you're solving the right problem right? So there's been many times where I've blown past the mindset not taking the pause. And I start getting in solution oriented, and i'm solving the wrong thing, and so that ends up being a lot of time wasted, capital wasted, and energy wasted. So here, at limitless, we start with the

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00:43:08.020 --> 00:43:09.049

Tiffany Charles: deep breath.

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00:43:09.340 --> 00:43:38.830

Tiffany Charles: What are we trying to solve? How is it showing up for us? Why are we triggered by that? What are we trying, you know, like? Why, when that very top client calls, are we panicking versus being super excited to be like, hey? So glad you're calling today. You know it's top



client. but we have this fear of like oh, gosh like it could be anything. so just working through like, how's that showing up, and why and then mapping gotta get your vision clear. So your decisions are easy. It's one of the most important things that we do here.

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00:43:39.900 --> 00:43:54.070

Tiffany Charles: as well. Because as soon as that's clear, then the decisions are are are really easy. It's just the next steps, and then we get our methods in place. and then all the folks on that wheel are working together, and you start picking up that momentum.

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Tiffany Charles: so you'll see that built out throughout the calendar and limitless you'll we take a very intentional path

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Tiffany Charles: to go through each one of these steps. and if your past shifts a little bit, we're here to adapt with you. but if you always go in that order. You'll have the successful outcomes that you're looking for.

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00:44:15.190 --> 00:44:44.349

Jarrod Musick: and it's also really important that here at limitless this is nobody's first radio that goes for Stephanie. to the team all of us on here as advisor coaches as well. so all of the applications that you're going to see all of the lessons that you're going to have access to the coaching that you're going to receive. This is not the first time, and it's really intended to allow you to continue to expand and elevate what you're already doing

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00:44:44.360 --> 00:44:49.850

Jarrod Musick: to operate as your best self, and get your firm and your team to operate as their very best selves.

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00:44:49.860 --> 00:45:17.980

Jarrod Musick: so all of the tools and training are here there's assistance all along the way. and there's accountability. That's a big part of the limitless program. So people who are going to ask you what your intentions are what your plans are. Give you really good feedback and coaching to ensure that you're going to get there when you say that you want to and then there's the whole group. There's 188 of us on the call right now, which is awesome. You have peers to be able to lean on

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00:45:18.260 --> 00:45:40.300

Jarrod Musick: one of the things that I love absolutely the most about limitless is every time we do a retreat or we do a lesson. I get a takeaway as well. So I get to learn from all of you really talented people here, and I would encourage you lean on your peers, get to know people



really collaborate together, because you're going to be able to take each other forward so much further than you thought possible.

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00:45:42.350 --> 00:45:52.829

Stephanie Bogan: And I think just the community that we've really created together over the few years. I see a lot of legacy alumni people that you know. We're here for a year or 2, took a break

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00:45:52.840 --> 00:46:15.079

Stephanie Bogan: and are back, because right, that community and everything that not just that you get from us. But what you get from each other is the kind of place that you really like to keep, because the growth in the development never really ends. So this year is really focused on the priorities that you're going to tackle. So we're gonna be diving into our January workshop and your roadmap calls after that, which we'll talk more about.

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Stephanie Bogan: But we talked at some point in your learning process about around limitless. We really talked about building a coaching roadmap right? Where are you to Adams conversation? What's the practice you have. What's the practice you want? And what are the steps that you need to take to bridge that gap? What's that roadmap for change?

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Stephanie Bogan: So we'll be working with you to create your coach and guide map from your practice diagnostic to create the lessons. So we're going to be following a track

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Stephanie Bogan: together as a group, and you're gonna have the ability, what we like to call. Choose your own adventure. Right? You're going to be able to customize where you focus your time, energy and attention based on the priorities that are most important to you over the course of the year.

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00:46:55.330 --> 00:47:03.140

Stephanie Bogan: we're gonna do that over the course of 4 retreats, 5 retreats. If you're in leaders, performance, value, productivity and growth

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00:47:03.180 --> 00:47:22.969

Stephanie Bogan: us, all the dates and retreat information, if you can attend. It's actually awesome and ideal. If you're joining us virtually it's still going to be a fantastic experience. Our goal is to really take this journey together and really go through 9 learning paths over the course of those 4 retreats. Right there shifts that we talked about in the very beginning.



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Stephanie Bogan: and that's really ultimately going to be a working path that looks like this. What are those base camps that we need to Really.

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Stephanie Bogan: you focus on? To set ourselves up for success this year to set our teams and our firms up for success this year. Mindset vision time.

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Stephanie Bogan: What's the gas in the car? Right? How do we get the highest octane fuel that's our client model and the strategy

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00:47:45.070 --> 00:48:03.620

Stephanie Bogan: and the services that we offer. And when you're clear on those things it formulates your strategy, and then you can apply that to staffing operations and growth. Right? So this is how we make sure that as we're going through those lessons, we're doing it in a very clear, intentional, and aligned way with your vision and goals

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00:48:03.630 --> 00:48:18.450

Stephanie Bogan: to our earlier conversation, and you start making staff and operational decisions before you're clear on the client model and the services right, You can end up with a lot of complexity and compromises that are going to dilute your performance productivity, right? And ultimately your profitability.

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00:48:18.460 --> 00:48:23.990

Stephanie Bogan: So this is sort of the the coaching path that we're going to go through together over the course of the year.

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Stephanie Bogan: Here's the way that we're going to do that. We have this for retreats and then coaching support in between those retreats. This is all of that engagement that we really encourage you to take advantage of.

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Stephanie Bogan: we have that practice development call. So we're going to spend 90 min together really talking about practice strategies, shares, shortcuts, practical in the trenches.

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00:48:44.180 --> 00:48:50.549

Stephanie Bogan: things that you can apply and learn beyond those lessons, or about how to make the most of those lessons we'll share

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00:48:50.710 --> 00:48:59.020

Stephanie Bogan: what your peers are doing. So this will be really open, engaging conversations where we'll come together to really talk about strategies and shortcuts for elevating

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Stephanie Bogan: areas of the practice. We'll have our personal development Call I Liz right? Other speakers will come in and really talk about how you can elevate your personal performance, mindset strategy and state this year to really not just succeed

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00:49:14.920 --> 00:49:27.630

Stephanie Bogan: financially and structurally, but personally right in ways that you feel really great. About every week we'll have an office hours those office hours. We every Other Week with Liz focused on Mindset

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00:49:27.640 --> 00:49:47.489

Stephanie Bogan: every Other Week with Lauren focused on practice. So the idea is you can go any. We can get guidance and direction around your next best step, but we'll also be giving you guidance and direction over the course of the year. When we do check-ins about hey, show up for this next office hours. We want to check in with you about X. Your job is to take advantage of those

321

00:49:47.550 --> 00:49:55.929

Stephanie Bogan: and really come to those opportunities really engaged right here. My questions Here's where I need clarity. Here's where I'm challenged. Here's where i'm stuck

322

00:49:56.010 --> 00:50:07.619

Stephanie Bogan: so that you can't right Spend 5, 1015 min on that issue with with the coach and your peers, and really make sure you're in a position to take a clear next step that you feel good about.

323

00:50:08.060 --> 00:50:10.610

Stephanie Bogan: So really take advantage of those office hours

324

00:50:10.620 --> 00:50:33.739

Stephanie Bogan: as we'll talk about Adam mentioned, and Allison is going to give us a demo in just a moment. There's the good 5 tribes which is our community, where, for those of you in virtual right. You can go to ask those coaching questions and get both key or peer. I'm sorry I get talk today. Coaching and peer support. Right? So if you've got a specific question, you want feedback on something that's where you can take it. You can also bring it to those office hours, Of course, at any time.

325

00:50:33.750 --> 00:50:51.810



Stephanie Bogan: we'll send you monthly status check in. She'll get an email that asked you how things are going? Are you feeling clear and focused and motivated on the right track? Are you feeling stuck and overwhelmed? And then we'll talk with you about your next steps depending on whether you're in virtual or in lifestyle. If you're in virtual, we're gonna ask you to come to that next

326

00:50:51.820 --> 00:51:11.699

Stephanie Bogan: office hours, so we can tackle that issue with you. If you're in lifestyle, live and you have the personal coaching pass, we'll reach out to schedule a one on one call with you. See where you are. See if we can solve it or right Learn will check in with you to see if we can solve it or put you in touch with the coach that's in the best position to support you where you are at that moment based on your need.

327

00:51:12.080 --> 00:51:26.020

Stephanie Bogan: so those are the ways that you can take advantage of the support you should have calendar invites, and have downloaded all of that to your calendar as well as access to the good 5 tribes and the website which Alison will go into in just a moment.

328

00:51:26.610 --> 00:51:40.329

Stephanie Bogan: so you, as the member, will participate in the calls. Your team also has access to join us. there is a specific access and call links for your team depending on the calls. So please do reference. That

329

00:51:40.340 --> 00:51:56.399

Stephanie Bogan: we do track call participation as part of our check-ins and engagement. So if we get a bunch of team members in the call it honestly just dilutes our analytics. So there's a whole cheat sheet to help your team dial into the right to the right callings.

330

00:51:56.920 --> 00:52:12.659

Stephanie Bogan: there's also on the website which Allison will walk through in just a moment a team team team members only space. So a great place to go ask questions, connect with other team members from other offices, and talk through how you can support your firm and applying the limit of this concepts.

331

00:52:15.400 --> 00:52:18.229

Stephanie Bogan: All right. Everybody take a deep breath.

332

00:52:20.620 --> 00:52:22.120

Stephanie Bogan: Everybody say what? What?

333

00:52:23.300 --> 00:52:28.270



Stephanie Bogan: Yeah. See? This is the interactive part of the program. We're going to do that now. Thank you.

334

00:52:28.390 --> 00:52:46.159

Stephanie Bogan: Thank you, lady. So our alumni are like, okay, we got this. We know she's not going to give it until somebody does a look look right. Part of it is just it's right. There's a lot of information you are going to absorb over the course of limitless today is no exception, and it just continues from here.

335

00:52:46.620 --> 00:52:53.359

Stephanie Bogan: It's good to just pause and breathe so your brain literally can take that 15 s to process what you've heard.

336

00:52:53.480 --> 00:53:13.459

Stephanie Bogan: You can get grounded in the present moment again, and pay attention again in an engaged way for what's next, so that you can uptake the information that is important and relevant. This slide is important and relevant. It is your Q. One trail guide. So over in the course of the next couple of months between now and our March retreat.

337

00:53:13.470 --> 00:53:18.060

Stephanie Bogan: We want you to know the track or the path that you're going to be on, and what to expect.

338

00:53:18.480 --> 00:53:28.550

Stephanie Bogan: So pre-work and now between now and your roadmap calls you, and i'm sorry or retreat. On the 20 third you should be watching and completing all of the base camp lessons.

339

00:53:28.580 --> 00:53:53.699

Stephanie Bogan: mindset vision and time to really steep yourself and write the philosophy and learning here our workshop on the 20 third is not going to be a repeat of these, so please do watch them. We're going to dive in. The coaches are going to do show, and tells about how they've applied those concepts so that you don't have to sit around going. How do I turn this idea into an actual next step? That makes sense? We're going to peel back that curtain.

340

00:53:53.710 --> 00:54:05.180

Stephanie Bogan: So make sure you and your team watch those videos and come prepared to with your drafts of the read of the kind of the drafts of the work from each of those lessons. Right? Your model practice your one page, plan.

341

00:54:05.190 --> 00:54:21.129



Stephanie Bogan: your model schedules, so that in those workshops and those peer collaborations which are going to do a lot of on the 20 third you can share. Solve. Set your strategy in your next steps, and get even more clarity about your vision and goals before you hit that roadmap call.

342

00:54:21.520 --> 00:54:40.099

Stephanie Bogan: So we will have complete your lessons to your draft. We're gonna dive deeper and collaborate as a community on the 20 third as a retreat. Then you're gonna have over the next 6 weeks depending on when you schedule your roadmap call with Coach Lauren, so she's gonna evaluate your practice diagnostic with you.

343

00:54:40.110 --> 00:54:58.279

Stephanie Bogan: Understand what your vision and goals for the you are and help you get clear on the priorities and the path that you can take quarter over quarter. To stay focus. Your job is to get clear, get focused and get to work, not to get distracted, not to get overwhelmed, and that is probably your Number One challenge because we're giving you

344

00:54:58.290 --> 00:55:04.379

Stephanie Bogan: the equivalent of a mass of a bachelor's and a master's program and how to build an awesome advisory firm.

345

00:55:05.100 --> 00:55:17.450

Stephanie Bogan: right? But you're gonna just like in a in a university. Right? We're on a tr on a climb. Mount Everest. You're going to take it in sections. You're gonna do your base camp. You're going to acclimate. Then you're going to take your next climb. Then you're next.

346

00:55:17.550 --> 00:55:31.039

Stephanie Bogan: So that's what the roadmap call is gonna help you do it's gonna help you define your priorities so that you can define your path and work through it confidently over the course of the year. Anytime you have questions you can check in with us, and we'll help you reset that path

347

00:55:31.490 --> 00:55:50.629

Stephanie Bogan: for those of you in masterminds. you'll have your first mastermind call on February 6. We're going to be doing our mastermind training and meetups today. but that will be your first call to really engage after your meet up with your group and really start using the mastermind model. And then from January, through that March retreat.

348

00:55:50.640 --> 00:56:04.539

Stephanie Bogan: Your job is to be implementing and applying those base camp lessons, and we'll be holding a success Sprint in February, focused on high performance happiness where the habits and routines that you can really



349

00:56:04.550 --> 00:56:17.729

Stephanie Bogan: anchor to create your best, you time, productivity, and performance this year to really anchor you in the habits that are going to put you in the best possible position to execute on that plan and those priorities this year.

350

00:56:17.790 --> 00:56:29.019

Stephanie Bogan: That will very quickly take us to the first week of March for our dive into our first retreat, and then we will go through that process again. You'll have a lot of options at that point, and again you'll come back to that roadmap.

351

00:56:29.080 --> 00:56:33.709

Stephanie Bogan: Get re clear on your priorities, set them for the next quarter, and move forward.

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00:56:34.110 --> 00:56:46.050

Stephanie Bogan: so that is your trail guide for the next couple of months. Again, if you have any questions as we go, feel free to drop them in the chat Lauren is going to talk to you about that roadmap call, and what to expect in your time with her.

353

00:56:46.060 --> 00:57:05.250

Lauren Kaufman: Yes, thank you, Stephanie. So, as Stephanie mentioned all lifestyle members, both virtual and live. Get one call with me to map out your roadmap for the year and get clear together. So how the process is gonna work is this week. You are going to get an email with a link to take your practice diagnostic.

354

00:57:05.260 --> 00:57:11.579

Lauren Kaufman: This should not take you more than 5, maybe 10 min. and it just asks you some questions about

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00:57:11.610 --> 00:57:18.579

Lauren Kaufman: different aspects of your practice. It will give both you and I snapshot of where you're at within your firm.

356

00:57:18.900 --> 00:57:29.940

Lauren Kaufman: Once you do that, you will then receive an email that unlocks my calendar for you, and you will be able to schedule your 45 min call with me. They you can

357

00:57:29.950 --> 00:57:39.479

Lauren Kaufman: do them between January 20, fifth, and after retreat March 20, fourth. So if You're a newer member and want to go ahead and get started and map out the year



358

00:57:39.490 --> 00:57:50.079

Lauren Kaufman: feel free to schedule and February. If you're a returning member feel like you got your the ropes. and maybe you want to meet after a treat. You can do that as well.

359

00:57:50.150 --> 00:58:02.889

Lauren Kaufman: We'll have our call. I'll be attaching in my email a model agenda. So you know exactly what to expect, what to prepare for and then together we will create your guide map and get going on the year.

360

00:58:03.830 --> 00:58:04.700

Stephanie Bogan: Awesome.

361

00:58:04.820 --> 00:58:22.439

Stephanie Bogan: so that's gonna be your first point of rate Coach clarity to really make sure you're clear, you're focused, and you know where to apply your energy and attention. Right? Do the work over the next quarter, and then each quarter there after. So definitely be. Look forward to that, and be sure to come prepared

362

00:58:22.580 --> 00:58:30.140

Stephanie Bogan: with your drafts. we'll send you an agenda for that call, and the goal will be to leave that call with a lot more clarity and roadmap for moving forward.

363

00:58:30.640 --> 00:58:48.679

Stephanie Bogan: this is a little bit about what that process will look like on your side of the fence. Lauren will talk through your guide map with you, which is, think of it as an inventory of the lessons, and how you're performing. Help You rate those in order, priority by quarter, and then we'll translate that into your coaching trail Guide.

364

00:58:48.690 --> 00:58:57.420

Stephanie Bogan: We can identify your big priority, each quarter your big, important goal, that thing you should most focus on, to truly move the needle.

365

00:58:57.610 --> 00:59:11.150

Stephanie Bogan: and then right other priorities that will support that. What are the related lessons, and what are your team and other actions that need to be taken to support right that coaching agenda for the quarter, so that you have clarity as you go through each quarter

366

00:59:11.920 --> 00:59:29.120



Stephanie Bogan: for those of you in virtual right, you'll get that support through the calls, office hours and tribes for those of you that are in. Live with the personal coaching. Pass right any time you need clarity on that right. We'll be reaching out and connecting with you right. We're happy to sit with you. and what work through that, and create greater clarity with you

367

00:59:29.280 --> 00:59:38.980

Stephanie Bogan: that will translate into your one-page business plan which will include our work together. Rate your limitless work for the year as well as other things there might be things that you're engaging in

368

00:59:38.990 --> 00:59:52.800

Stephanie Bogan: that aren't directly related to your limitless path or a lesson. But you're still gonna want to make sure that they show up in your one page business plan. So that's where your other priorities and your limitless priorities come together, so that you create clarity about your path and your priorities for the year.

369

00:59:53.030 --> 01:00:11.419

Stephanie Bogan: and then the website which we'll show you in just a moment is where you'll go to watch or re-watch those lessons, download the guidebooks and the resources, right strategies, and the shortcuts that right that you can put into practice, because that will give you huge shortcuts. You'll be 60 or 70 of the way there, and you can customize it from there.

370

01:00:11.430 --> 01:00:17.599

Stephanie Bogan: and then again, you'll dive into those engagement support. Strategies will be here to help you in the the different ways that we can.

371

01:00:19.990 --> 01:00:34.839

Stephanie Bogan: All right. I'm supposed to tell you at this point. Stop! Do not pass. Go! Do not collect your \$200 for the awesome results that are available to you this year. until one you've made sure you've added coaching and limitless fa to your inbox. There's

372

01:00:34.910 --> 01:00:48.339

Stephanie Bogan: continuous issues with spam and filters depending on your firm or organization. So please do that. So you don't miss any communications we had some issues with some of you getting enrollment information because we were. We were being spam blocked

373

01:00:48.350 --> 01:00:56.890

Stephanie Bogan: Make sure that you read your inbox insights, which is our Monday communication. You'll get that every Other Week. We do not want to collider your inbox.



374

01:00:57.110 --> 01:01:16.589

Stephanie Bogan: Be sure to read it. That's where information on what's coming up pre-work coaching insights, resources, and reminders about things you can use or do. Tips and tricks and techniques will all be baked in there, so make it make a point to read those when you get them each week and make sure that you're started on your base camp lessons, and you have drafts of those when you come

375

01:01:16.600 --> 01:01:18.749

Stephanie Bogan: to the retreat on January 20, third.

376

01:01:19.650 --> 01:01:22.029

Stephanie Bogan: Great, I think I've checked all the boxes

377

01:01:22.210 --> 01:01:33.899

Stephanie Bogan: questions. Did we get all of the questions in the chat answered. What questions do you have? If any before I turn it over to Allison for your demo of the tribe and website

378

01:01:35.550 --> 01:01:38.519

Stephanie Bogan: any juicy, unanswered questions we can tackle

379

01:01:40.050 --> 01:01:44.770

Stephanie Bogan: all right. We are focused and efficient. Allison. I will turn it over to you.

380

01:01:45.300 --> 01:02:05.289

Limitless Adviser: Okay, awesome. I must be a nerd, because Stephanie thinks this is the boring part, but I get very excited about the website. I don't think it's boring. I just I think it's cool when you get to do the tour. I did. we did have this one other slide. I need to go over really quickly. this is contained in all the emails that you've gotten

381

01:02:05.300 --> 01:02:18.869

Stephanie Bogan: but this is where you can go for support depending on the issue and the program that you're in. And again that information is on the emails that you've gotten, and it will be in your inbox a reminder. So check there for it. If you have any further questions

382

01:02:19.330 --> 01:02:25.429

Limitless Adviser: now, Alice, you can take it away Awesome. Here I go, all right. I will share my screen.

383

01:02:26.810 --> 01:02:28.240



I think I have to stop you

384

01:02:28.480 --> 01:02:30.029

Limitless Adviser: all right.

385

01:02:30.050 --> 01:02:48.270

Limitless Adviser: So all of you should have access to the website and to try by now this is your homepage, and i'm going to walk you through each of the different areas, and how you can really use the site and try to get the most out of the program. First of all. When you sign in, you're going to see the program pack, which will include the lesson that we deliver throughout the year.

386

01:02:48.280 --> 01:02:57.259

Limitless Adviser: On the right hand sidebar you'll find the calendar as well as your big Y and your top 3 goals for the year, just to keep those in the forefront of your mind

387

01:02:57.380 --> 01:03:06.210

Limitless Adviser: at the bottom you'll be able to see the lessons coaching calls office hours, and if you're an alumni you'll see the lessons from your previous beers here in the program.

388

01:03:06.900 --> 01:03:21.739

Limitless Adviser: All right. Now. Down on the left hand sidebar you have your calendar, which is where you can click to see the upcoming events that you have, as well as what you've downloaded from the getting started Page, which hopefully is synced to your calendar. So you have all those zoom links immediately available for you.

389

01:03:22.060 --> 01:03:41.320

Limitless Adviser: under coaching center. This is where you can go to see recordings of all of our calls coaching calls, and lessons. Lessons will be in the learning center. Okay, then you also will have this year the opportunity to take a practice diagnostic. Lawrence going to talk a little bit more about this in a moment.

390

01:03:41.330 --> 01:03:47.060

Limitless Adviser: but this will allow you to do an assessment, and to evaluate where you are in your practice.

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01:03:47.130 --> 01:03:51.810

Limitless Adviser: So you'll move through this here, and then, when you're completed you'll see your results

392

01:03:51.960 --> 01:04:08.629



Limitless Adviser: based on where you are in your results. You'll be able to scroll down and to be able to click on a button. Nick, this is critical, and be redirected to the lesson where you need to work. So this will hopefully be a really efficient way for you to be able to prioritize what you want to work on.

393

01:04:09.170 --> 01:04:12.369

Limitless Adviser: All right. So back here under coaching center.

394

01:04:12.380 --> 01:04:33.829

Limitless Adviser: This is also where you would go for support. So say you want a one on one and call with Tiffany, or with Adam, or with Liz or with Lauren. You could click here. Remember, you do have the option to go to their weekly office hours with Lauren and Liz those alternate, so you always have those available. But if you really want some one on one face time with them. This is where you would go to request that

395

01:04:34.620 --> 01:04:40.890

Limitless Adviser: under learning center we have all of the content on the website grouped by lessons and learning

396

01:04:41.020 --> 01:04:52.210

Limitless Adviser: lessons are going to be listed here alphabetically when you come to this page. Sometimes, if you see 2 versions. It's because we have multiple lessons for different years. So don't let that throw you.

397

01:04:52.370 --> 01:04:59.090

Limitless Adviser: When you come into the lesson you'll see you have the video. So it will be slides a transcript and the audio.

398

01:04:59.150 --> 01:05:04.570

Limitless Adviser: You can watch the video. They're usually between an hour and an hour and a half, so you can schedule your time. With that

399

01:05:04.670 --> 01:05:13.500

Limitless Adviser: there will be actions that usually 3 to 5 of them resources that are referenced in the action set, and then a reading list.

400

01:05:13.570 --> 01:05:21.940

Limitless Adviser: Once you've done those you can mark this left and complete, or you can explore lessons that are related to this one on the right hand sidebar.

401

01:05:22.360 --> 01:05:36.980

Limitless Adviser: The next thing we have under the learning center is learning path, and this is my favorite way to explore our website. All of



our lessons are grouped topically, and so say you really wanted to dive into digital marketing or branding

402

01:05:36.990 --> 01:05:53.320

Limitless Adviser: or setting and sharing feed. You would click on one of these learning path, and we have all of the lessons divided into trail Head lesson and an advanced client lesson. The Trial head lesson is your foundational lesson that you'll want to complete, especially if you're a first year member

403

01:05:53.430 --> 01:06:05.720

Limitless Adviser: after you've completed that lesson, and you feel like you're a pro, or you're getting there. You can move on to the advanced client lesson. For example, in the nail in your niche, learning path, you'll see that we have an in your next lesson.

404

01:06:05.790 --> 01:06:23.299

Limitless Adviser: and then, once you feel like you're you're pretty competent there. You can move on to navigating your net, shifting your next with success and marketing your niche. So this is the way I would recommend if you really have a topic that you want to dive deep on, spend some time looking at the learning path and moving through the Western this way.

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01:06:23.650 --> 01:06:42.379

Limitless Adviser: all right. The last thing under Well, I think second class that I wanted to touch on here under Learning Center is a library. This is a super easy way to just search for a resource if you know the name of it already. For example, one page financial plan. Here's the lesson. Here's the guidebook, and here's some resources

406

01:06:42.410 --> 01:06:51.369

Limitless Adviser: I do always recommend that you click into and explore the actual lesson, because there will be more resources that are listed here in the library. This is just to get you started

407

01:06:51.510 --> 01:07:04.749

Limitless Adviser: last under Learning Center. You'll find retreat. This is where we post all of the resources and all of the recordings from every retreat. So you can go in if you missed discussion, or you had a conflict, and you can watch those here on the website.

408

01:07:05.060 --> 01:07:09.159

Limitless Adviser: all right, and then last, before I jump into tribe, is the Member Directory.

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01:07:09.290 --> 01:07:16.610



Limitless Adviser: the Member Directory, where you can come. You can apply a filter to search for people that are, for example.

410

01:07:16.680 --> 01:07:18.060

Limitless Adviser: in your State

411

01:07:18.540 --> 01:07:20.910

Limitless Adviser: and reach out to folks that way.

412

01:07:21.220 --> 01:07:23.890

Limitless Adviser: Okay, so this is a really useful tool as well.

413

01:07:24.460 --> 01:07:32.359

Limitless Adviser: Next, when you want to go to tribe, you'll click on good vibes tread, and that will take you to our wonderful good vibe.

414

01:07:32.760 --> 01:07:54.309

Limitless Adviser: there's a lot of content in here, so feel free to poke around. We have a leaders. V. IP. Room. We have our coaching corner, which includes all of our tribe talk recording our book club content. If you want to share a big win, you can do so just always include Hashtag big win, so we can be sure to pull those and include those here as well as the recording.

415

01:07:54.350 --> 01:07:59.409

Limitless Adviser: If you have a general question, you can post it into the lounge. General chat here.

416

01:07:59.430 --> 01:08:16.159

Limitless Adviser: or you can post by topic. So there's a really wide array of questions and answers and conversations in here that is really excellent material for you to explore. If you want to get together with people who share your niche, ask questions on a niche related topic, feel free to use this space.

417

01:08:16.260 --> 01:08:24.800

Limitless Adviser: you can create your own member rings as well, and last, you can chat with your mastermind group in here. If you've elected to be in a mastermind.

418

01:08:24.840 --> 01:08:33.500

Limitless Adviser: So this is just where you can increase each other's. Accountability share notes, share how you're all feeling for the day. Things like that.

419



01:08:33.720 --> 01:08:46.840

Limitless Adviser: all right. So that is our mile a minute. Run through the website and try if you have any questions, please feel free to let us know. But hopefully, that helps you get started, and the best thing you can do is just get in here and poke around and start exploring yourself.

420

01:08:47.319 --> 01:08:48.930

Stephanie Bogan: Are you ready for the quiz?

421

01:08:49.899 --> 01:08:51.669

Stephanie Bogan: This is out.

422

01:08:51.960 --> 01:08:54.689

Limitless Adviser: You have your master

423

01:08:55.060 --> 01:09:08.159

Stephanie Bogan: all right. So a in my defense. I never said it was boring. I said it wasn't the most sexy part of the program. Because let's be honest, right. We want to get to all the fun, stuff and conversations and shifts and strategies and shortcuts.

424

01:09:08.170 --> 01:09:27.829

Stephanie Bogan: And this is the track that you want to follow right. The the the plumbing, or the pipe like these are the gears that make everything work. If you don't understand them, use them and apply, then you're simply not going to get as much out of this year, so our goal is to really make sure that you do just that.

425

01:09:27.840 --> 01:09:31.109

Stephanie Bogan: And then Allison, I'm. Going to take back the screen.

426

01:09:31.500 --> 01:09:41.879

Stephanie Bogan: Are you saying what you should be saying? I have 2 screens, so I i'm never quite sure switch to the presenter. We're looking at your prevent remote

427

01:09:42.260 --> 01:09:43.809

Limitless Adviser: one more time

428

01:09:44.140 --> 01:09:49.509

Stephanie Bogan: that didn't work. See now, I don't even know what anyone's looking at. All right. Hold on

429

01:09:50.060 --> 01:09:54.300



Adam Cmejla, CFP®: while step is doing that. The one thing that i'll say about just

430

01:09:54.420 --> 01:09:56.370

Adam Cmejla, CFP®: with everything that

431

01:09:56.600 --> 01:09:59.109

Adam Cmejla, CFP®: Allison went over first of all.

432

01:09:59.270 --> 01:10:06.730

Adam Cmejla, CFP®: unbelievable job by the team in building that out and getting that content organized in the way that it is.

433

01:10:07.170 --> 01:10:08.380

Adam Cmejla, CFP®: if anything.

434

01:10:08.460 --> 01:10:20.990

Adam Cmejla, CFP®: what you're seeing now versus the bootstrapped version in 2,018 is just an insane improvement, and that's what happens when you have for going on 5 years now to refine a business model. But my point in saying that

435

01:10:21.250 --> 01:10:22.280

Adam Cmejla, CFP®: is.

436

01:10:22.810 --> 01:10:26.420

Adam Cmejla, CFP®: they're the only reason, the only

437

01:10:26.460 --> 01:10:44.810

Adam Cmejla, CFP®: barrier, if you will, to progress in this program is going to be based off of your commitment because there is no shortage of resources. There's no shortage of human capital. There's no shortage of of commitment to your success outside of what you invest into that what I will say. step, just go flip. A swap displays up top

438

01:10:45.050 --> 01:10:46.920

Adam Cmejla, CFP®: that should do it.

439

01:10:49.970 --> 01:10:52.040

Stephanie Bogan: doesn't like me today.

440

01:10:54.010 --> 01:10:58.610

Limitless Adviser: you to the right of that.



441
01:10:59.250 --> 01:11:02.650
Limitless Adviser: There you go right? Yeah.

442
01:11:02.670 --> 01:11:06.090
Adam Cmejla, CFP®: last last thing that i'll say

443
01:11:06.740 --> 01:11:10.570
Adam Cmejla, CFP®: when you think of tribe right? And I think this is a great

444
01:11:10.960 --> 01:11:16.709
Adam Cmejla, CFP®: melting pot, if you will of everybody, whether you're live or virtual, you

445
01:11:17.050 --> 01:11:30.270
Adam Cmejla, CFP®: the ability to share in tribe 2 things that work really really well for me. And I know we'll talk about this as we get into the program here. But the the the favorite quote of journaling is, I didn't know what I was thinking until I wrote it down.

446
01:11:30.280 --> 01:11:37.350
Adam Cmejla, CFP®: I found my greatest points of vulnerable vulnerability. When I when I just laid it all out for

447
01:11:37.440 --> 01:11:42.679
Adam Cmejla, CFP®: for my fellow limitless members at the time. That's where I saw the greatest growth. So

448
01:11:42.690 --> 01:12:05.979
Adam Cmejla, CFP®: yes, stocking tribe right and just reading, whether people are are posting can be beneficial. But the engagement that you have, or if you engage in tribe and put your questions out there, whether it be just. If you're in your mastermind or the greater community it, it's just it's amazing. The power of support and the power of community and what they can do for your growth. So Allison and team great job in building all that out. And thank you.

449
01:12:06.810 --> 01:12:15.950
Stephanie Bogan: Thank you. Awesome. Yeah. And again, all of that information is there, Allison, we're post these videos to the website. So you or your team can go back and re-watch it as needed.

450
01:12:15.960 --> 01:12:44.149
Stephanie Bogan: some of you should have received your welcome package by now. Some of you may still be receiving it. It has your limitless calendar



for 2024 of your key right actions as we kick off this year is. Make sure that calendar is set out if you haven't gotten the big, beautiful, laminated copy. Please, don't let that stop you. You can print out calendars from the Internet right just for word, document and map it out. And then right put it on the wall and do the cool thing when the calendar arrives.

451

01:12:44.160 --> 01:12:57.730

Stephanie Bogan: you also have a few other things in there. you have your post. It's right to keep you focused on track this year, and to remind you that your goal this year is to crush your climb whatever that means. and then anyone bring their party horns.

452

01:12:59.650 --> 01:13:22.519

Stephanie Bogan: All right. You're gonna want to keep those, because we will be some. And yes, there will be participation points and prizes. Because why the heck not we should really engage and enjoy ourselves this year and celebrate our successes and our win. So because we are team players. Let us all ticked out into our party horns. I just want to note I have not received mine, otherwise I would fully have it available to me.

453

01:13:22.580 --> 01:13:28.980

Stephanie Bogan: and let's give Allison and the team to for ready all the hard work and putting all of that together for you.

454

01:13:30.050 --> 01:13:41.409

Jed Levene: Yay, Thank you. Yes, but I want you to know that that is really intended to steep you all in getting used to be.

455

01:13:42.690 --> 01:13:45.079

Stephanie Bogan: It's the ultimate goal

456

01:13:45.170 --> 01:13:59.190

Stephanie Bogan: right by the end of the year. That will mean that you'll be pulling this parting arms out like Yes, absolutely. Jeff crushed it. Let's give him the high 5, or the book for whatever it is. But right now these are just new behaviors. Their pattern interrupts like.

457

01:13:59.200 --> 01:14:16.880

Stephanie Bogan: Where do you go into party horns and a professional development call. Here is where you go and do that right, because it's just about breaking the boundaries of what's comfortable and condition, and taking those next best steps to create another level of success and possibility for ourselves. So, party horns it will be.

458

01:14:17.020 --> 01:14:18.280

Stephanie Bogan: ladies and gentlemen.



459

01:14:18.920 --> 01:14:34.910

Stephanie Bogan: Now this is the place where you can no joke to your own horn, and everyone else's like. Do you see what I did there that's pretty. Alright, yeah, i'm not really a comedian. But, hey, we're working on it there. That's never a question on any of the surveys with Stephanie. Funny, never going to show up

460

01:14:35.150 --> 01:14:50.710

Stephanie Bogan: performance. Retreat is on January 20. Third. You've gotten information to register for that. Please do so for that in March so we, the team can plan. They do a lot of work behind the scenes to make it seem simple and seamless. but there's a lot of steps between here and there.

461

01:14:50.720 --> 01:15:10.540

Stephanie Bogan: so letting us know who's coming is a very important step to the team, being able to make the most of that experience for you. Again, we'll be doing this workshop style, show and tell right so when I could be talking at you. We're going to be talking with you and together, and sharing best practices and strategies and solves to make sure we're all moving forward with clarity and confidence together.

462

01:15:11.810 --> 01:15:16.160

Stephanie Bogan: All right. What is your number? One job as you move through Limit list this year.

463

01:15:16.830 --> 01:15:19.690

Stephanie Bogan: This is a quiz, and I have posted the answers.

464

01:15:22.360 --> 01:15:25.360

Stephanie Bogan: This is the interactive part. Anyone can jump in at this point.

465

01:15:26.740 --> 01:15:34.790

Stephanie Bogan: Be clear and get focused and get to work.

466

01:15:35.050 --> 01:15:47.390

Stephanie Bogan: So it is very easy. Anytime you create change any change. Your brain will go into survival mode. It will create resistance that often show up shows up is overwhelmed.

467

01:15:47.400 --> 01:16:05.759

Stephanie Bogan: That is doubly so here, because we're gonna expand your possibility set in massive ways. You're gonna see what's possible and how to get there in ways that you haven't before, and you're gonna want to



walk up to the buffet and eat everything. But if you did that what would happen?

468

01:16:07.990 --> 01:16:14.959

Stephanie Bogan: It would be gluttony. It would feel awful and uncomfortable, and you'd be sick and right. Your body would be overwhelmed.

469

01:16:15.330 --> 01:16:16.620

Stephanie Bogan: Don't do that

470

01:16:17.250 --> 01:16:25.300

Stephanie Bogan: right. We're gonna bent to box it. You're gonna have meals and courses. Package, right? That's your roadmap. What do you need to be focused on?

471

01:16:25.440 --> 01:16:36.660

Stephanie Bogan: And then that whole process is designed to help you get clear, get focus and get to work on the essential. Few things that are going to really move the needle this year and each quarter within that year.

472

01:16:36.710 --> 01:16:43.019

Stephanie Bogan: anytime you feel stuck. You're struggling, you feel overwhelmed. Remember this conversation.

473

01:16:43.040 --> 01:16:55.320

Stephanie Bogan: that disruption and that discomfort tells you that you're on to something. It's what you choose to do about it differently this time. That will make this year different.

474

01:16:55.790 --> 01:17:02.130

Stephanie Bogan: I don't know about you guys, but I am really ready to walk with you on that journey, and I know that the team is as well.

475

01:17:02.620 --> 01:17:03.879

Stephanie Bogan: Are you excited?

476

01:17:05.210 --> 01:17:07.379

Stephanie Bogan: Do I get a party horn or a whoop up

477

01:17:07.400 --> 01:17:08.430

Andrew Hatherley: global up.

478



01:17:08.550 --> 01:17:09.340
Oh.

479
01:17:09.390 --> 01:17:10.550
Limitless Adviser: what a

480
01:17:10.710 --> 01:17:16.520
Stephanie Bogan: no! I would like if this were on TV. We'd be like one more time. Let's rouse.

481
01:17:16.590 --> 01:17:19.080
Stephanie Bogan: Give me a little one on the kind of 3, one.

482
01:17:19.110 --> 01:17:34.290
Stephanie Bogan: 2, 3, that was not a bad start. We have an entire year to practice, and what I want you to know is the sooner that you get better, and engaging in positive ways, virtually

483
01:17:34.300 --> 01:17:43.430
Stephanie Bogan: the less i'm going to make you do these silly things right, so jump all in. You got it right to your horn, and let's make the most of this year together

484
01:17:43.680 --> 01:17:49.469
Stephanie Bogan: any final questions as we wrap and kick off mastermind training for those of you who are in masterminds?

485
01:17:49.770 --> 01:17:51.199
Stephanie Bogan: What questions remain?

486
01:17:54.150 --> 01:18:05.630
Stephanie Bogan: All right. My question is, Are you clear and focused on how to leverage the support, the systems and the structure that we've built here to help you make the most of the year

487
01:18:07.590 --> 01:18:10.770
Stephanie Bogan: Can I hear

488
01:18:11.310 --> 01:18:12.080
Stephanie Bogan: alright.

489
01:18:12.180 --> 01:18:15.559
Stephanie Bogan: You will have questions. This is new information.



490

01:18:15.660 --> 01:18:32.529

Stephanie Bogan: You're gonna be engaging in multiple sites, and you're right inbox insights the website tribe. The sooner that you just jump in and deal with that comfort and get over the hump the easier it will get, and the smoother the runway will be. So. The second you find yourself in that situation. Stop!

491

01:18:32.680 --> 01:18:40.909

Stephanie Bogan: And what's that saying? Eat the frog, Just eat the frog, get through it so that we get on with the really good and impactful work that we want to do together.

492

01:18:41.100 --> 01:18:46.609

Adam Cmejla, CFP®: So, Stephanie Christie posted in chat, and it might have gotten buried by some feedback here already. What?

493

01:18:46.690 --> 01:18:49.389

Adam Cmejla, CFP®: What breakthroughs are you most excited about this year?

494

01:18:49.780 --> 01:18:50.610

Stephanie Bogan: Me.

495

01:18:50.680 --> 01:18:58.999

Adam Cmejla, CFP®: Yeah. I'm: I'm. Assuming that that i'm reading verbatim, Christine Christie's question here. So being she has a question behind the question.

496

01:18:59.030 --> 01:19:16.580

Christy: That is me.

497

01:19:16.590 --> 01:19:22.469

Stephanie Bogan: She's just on fraternity leave, and she's like, yeah, that is super limitless by this all the time here.

498

01:19:22.660 --> 01:19:28.430

Christy: No. But I want to hear for you like for Stephanie Bogan. What are you? What breakthroughs

499

01:19:28.970 --> 01:19:31.620

Christy: are you most excited about?

500

01:19:31.690 --> 01:19:42.840



Stephanie Bogan: breakthroughs? One: i'm really excited about the the just the team that we've added. We added right, Lauren and Jackie joined us in the last quarter of last year, so

501

01:19:42.850 --> 01:19:53.559

Stephanie Bogan: I am like giddy with excitement, is probably the good phrase, because, right as we've grown and grown pretty rapidly, you all understand this as founders and advisors.

502

01:19:53.570 --> 01:20:07.059

Stephanie Bogan: it's very easy to get pulled away from the vision you think about Covid. We move 10 times right. We had team changes. We had platform changes. We had just stuff right personally and professionally. If we're not really careful, it is so easy

503

01:20:07.130 --> 01:20:15.540

Stephanie Bogan: to lose that clarity and focus and do the work right. As Tiffany talked about in reaction to our circumstance, instead of sitting in that pause. So we did.

504

01:20:15.600 --> 01:20:34.900

Stephanie Bogan: We had a lot of disruptions over the last couple of years on top of really rapid growth. So there was a lot of really awesome learning we still got. We get amazing results. But we also saw those opportunities to really scale our special right. And what are the people processing platforms that are going to really get us there? What do we need to account for? So we did this sort of

505

01:20:35.040 --> 01:20:40.559

Stephanie Bogan: big vision meeting with the new team and Q 4, and really set that path, and

506

01:20:40.690 --> 01:20:59.710

Stephanie Bogan: it really moved me from a place of effort at action. Like, okay, I got to show up and run the shop and get all this stuff done back into that zone of inspired action, clear, conscious committed, confident about what we're doing, and why we're doing it and show up every day, energized and right, using that time as a catalyst for the awesome things we want to do today.

507

01:20:59.720 --> 01:21:02.170

Stephanie Bogan: and in the future. So for me it was

508

01:21:02.550 --> 01:21:11.719

Stephanie Bogan: really sitting in that place of pause and saying, hey, this is awesome. So we're going to ask you 2 really valuable questions over the course of the year.



509

01:21:11.780 --> 01:21:14.569

Stephanie Bogan: and they're also valuable when I ask them of myself.

510

01:21:14.730 --> 01:21:16.069

Stephanie Bogan: Is it working?

511

01:21:16.660 --> 01:21:18.219

Stephanie Bogan: Does it feel good

512

01:21:18.590 --> 01:21:24.590

Stephanie Bogan: right? So enough disruption and change compounds right? And you get we work over it if we're not really careful.

513

01:21:25.290 --> 01:21:34.179

Stephanie Bogan: right? And sitting in that moment of pause, which is exactly why you're here. Congratulations on that decision and investment sitting in that place of pause to say.

514

01:21:36.140 --> 01:21:37.430

Stephanie Bogan: Is it working for me

515

01:21:37.450 --> 01:21:50.100

Stephanie Bogan: like to working for the clients is kind of working here like. But, hey, what are the parts that don't feel good? And can I stop and solve for them instead of working over them right? We're just so good at that. So for me.

516

01:21:50.110 --> 01:22:02.569

Stephanie Bogan: That was the big, so great question, Christie. That was the big breakthrough right, that compounding of the compromises and the stress and right you have to sit in the space of clarity. That's why coaching and community are so valuable.

517

01:22:02.770 --> 01:22:15.170

Stephanie Bogan: just so happens that my coach died of cancer the year before, so that place in that space that I would normally go to process and get perspective was gone, and then I had to deal with the grief that came from that

518

01:22:15.200 --> 01:22:32.639

Stephanie Bogan: right. So I sort of, and you know. Anyone who knows my story knows that if I start over with the new coach or a therapist I gotta go through all the trauma again. I wasn't really excited about that. So let's be honest. I may have put that off a little bit that created space



for those issues to compound, and as soon as I got reconnected with those questions. Hey.

519

01:22:32.830 --> 01:22:41.409

Stephanie Bogan: where is this working? Where is it not? How can I sit in the space? What do I need to account for. That's when I had that moment of clarity I was like. Look, there's some shifts we need to make.

520

01:22:41.750 --> 01:23:00.400

Stephanie Bogan: They're not all going to be comfortable. There's some investments we need to make. We gotta give ourselves time to integrate those. And that was really kind of the basis of the new business plan, the hires and all the really exciting, the the business model, the coaching access right, the changes that we've made this year we're all really inspired

521

01:23:00.410 --> 01:23:09.880

Stephanie Bogan: from that clarity and the breakthrough that came. So that's that moment of pause that we want to teach you how to take this year. I wish I took it in the perfect moment every time immediately.

522

01:23:10.510 --> 01:23:16.249

Stephanie Bogan: What I know is the amount of time we allow ourselves to this sit in that space gets better and better.

523

01:23:16.380 --> 01:23:25.079

Stephanie Bogan: and our ability to be aware and conscious and conscious that, and then to create a we get us out of it is a huge part of what we're going to share with you this year.

524

01:23:25.870 --> 01:23:31.319

Stephanie Bogan: So it's a great question to reflect back to you, which is, what is the breakthrough you most want to have this year.

525

01:23:32.210 --> 01:23:33.340

Stephanie Bogan: Kristy.

526

01:23:34.920 --> 01:23:37.160

Stephanie Bogan: What's the breakthrough you most want to have this year?

527

01:23:38.310 --> 01:23:40.899

Christy: for me? It's

528

01:23:41.460 --> 01:23:43.320

Christy: having the



529

01:23:43.340 --> 01:23:45.410

Christy: gusto, the courage

530

01:23:45.690 --> 01:23:47.980

Christy: to put my my brand

531

01:23:48.620 --> 01:23:51.879

Christy: out in the in the world with the with the pricing

532

01:23:52.290 --> 01:23:53.760

Christy: that I deserve.

533

01:23:54.960 --> 01:24:14.640

Christy: That's awesome. I I haven't done for it. It's it's every advisor on this website or on this call, knows like your website is like the easiest can to keep

534

01:24:14.650 --> 01:24:15.709

Christy: It's kicking

535

01:24:15.860 --> 01:24:19.430

Christy: down the road, because there's always something more important

536

01:24:19.770 --> 01:24:24.529

Christy: and more, you know, like serving clients, and like for me like this.

537

01:24:24.600 --> 01:24:34.589

Christy: This is like it's like my it's like my, since i'm not having any more babies. It's like my baby like this is this: this was my like. This: Company was my first navy, and like it's

538

01:24:34.870 --> 01:24:38.959

Christy: I I I want to get to the point when people go to my website that I don't say.

539

01:24:39.130 --> 01:24:55.930

Christy: Oh, i'm i'm sorry like i'm glad you called. Anyways, even though you went there like you. You overcome the first hurdle. Good job.

540

01:24:55.940 --> 01:25:13.020



Stephanie Bogan: But it's really yeah, of course it is. So Notice that's the clarity that I, Adam and Tiffany and Jared and verge and right. And Christy, that's the clarity that comes from this process like, how do we surface what we really need to solve for and get clear, and you can hear Christy saying.

541

01:25:13.030 --> 01:25:32.280

Stephanie Bogan: Yeah, I realized I was picking the can right? That's the behavioral insight that says, hey, what is it that. Why do I? Why am I putting this off? I'm really putting this off? Because I don't want to make these decisions? Because i'm uncomfortable, hey? Am I going to make results, or am I going to make excuses? Right? So it won't all happen instantaneously. Kristy's been in the community for a couple of years.

542

01:25:32.420 --> 01:25:42.669

Stephanie Bogan: but they will come, and they will compound over time. And the more clarity you get, the more you're able to move through the complexity and really create the practice in life that you want.

543

01:25:42.710 --> 01:25:57.220

Stephanie Bogan: So on that note we could not be more excited. I think you said that about 8 times already. I hope that you are as excited as we are about this year, because we are here to help you get clear, get focus and get to work building a much more limitless practice in life.

