



LIMITLESS LEADERS

COACHING MASTERMIND

January 9, 2023

KICKOFF

BUILD A WILDLY SUCCESSFUL BUSINESS AND A LIFE THAT YOU LOVE



1

WORK WITH
PURPOSE, ON
YOUR TERMS



2

DO WORK
THAT YOU
LOVE



3

WORK WITH
PEOPLE YOU
ENJOY



4

ENJOY
FINANCIAL
SUCCESS



5

LIVE A LIFE OF
HAPPINESS &
CONTRIBUTION

Living a Life Without Limits

STEPHANIE'S STORY



1996
FOUNDED
QUANTUVIS CONSULTING
AT AGE 24

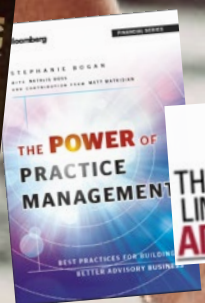
2008
SOLD TO GENWOTH
FORTUNE 200 EXEC TEAM

2012-2014
UNITED CAPITAL
BUILT ADVICE MODEL
& PRACTICE MODEL
M&A APPROVAL

2014
RETIRED TO BEACH IN COSTA RICA

2018
UN-RETIRED PART TIME
FOUNDED LIMITLESS ADVISOR

LIVING A LIMITLESS LIFE
Run 7-figure firm in 25 hours week
Combined businesses \$20M year
Sea & Slopes Life: Costa Rica & Park City



LIMITLESS LEARNING FACULTY

TEAMWORK MAKES THE DREAM WORK

LAUREN KAUFMAN
Practice Coach



ADAM CMEJLA
Integrated Planning & Wealth



TIFFANY CHARLES
Destiny Capital



LIZ HAND
Pleasant Wealth



STEPHANIE BOGAN
Chief Possibility Officer



JACKIE BENJAMIN-HATHERLEY
COO Coach

Advisor
Coach

JARROD MUSICK
Destiny Capital



Advisor
Coach

Advisor
Coach

Mindset
Coach

ALLISON FOULK
Program Manager



LEONA ABRAHAO
Advisor Services



KATHRYN WALLER
Program Specialist



MICHAEL
KITCES
Kitces.com



JULIE
LITTLECHILD
Absolute Engagement



MEGAN
CARPENTER
FIComm Marketing



LIMITLESS ALUMNI





1

WORK WITH
PURPOSE, ON
YOUR TERMS



2

FOCUS YOUR
TIME & ENERGY
ON WORK YOU
LOVE



3

WORK WITH
PEOPLE YOU
TRULY ENJOY



4

ENJOY ALL THE
FINANCIAL
SUCCESS YOU
DESIRE



5

EXPERIENCE A LIFE
OF HAPPINESS,
CONTRIBUTION &
FULFILLMENT

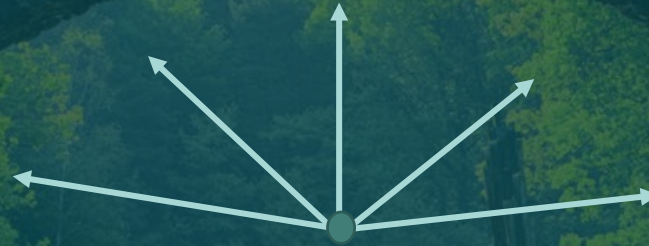
LIMITLESS

BRIDGING THE BEHAVIOR GAP

WHERE YOU ARE NOW
the experience you've created



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



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

WHICH OFTEN FEELS
LIKE THIS





MINDSET

THE SECRET TO SUCCESS LIES IN THE SCIENCE OF BEHAVIOR



MAPPING

WHEN YOUR VISION IS CLEAR, YOUR DECISIONS ARE EASY



METHODS

ALL THE BEST PRACTICES, READY TO WORK IN YOURS



MOMENTUM

MAKE RESULTS, NOT EXCUSES

LIMITLESS COACHING MODEL

A TESTED TRACK TO RUN ON

Limitless Coaching provides you a tested track to run on. No trial runs here.

TRUSTED COACHES TO ELEVATE YOUR GAME

You show up with the commitment, and we'll guide you through the changes.

PROVEN PRACTICES AND A PATH TO FOLLOW

Without a new path and better practice, you're likely to keep getting the same results.

THE TOOLS AND TRAINING YOU NEED

Our coaching, courses, & content put strategies & solutions you need at your fingertips.

ACCOUNTABILITY THAT CREATES ACTION

We'll help you think bigger, take more and better actions knowing we have your back.

A TRIBE TO TAKE YOU TO NEW HEIGHTS

Limitless is a tribe of growth-minded advisors committed to their success and supporting yours.



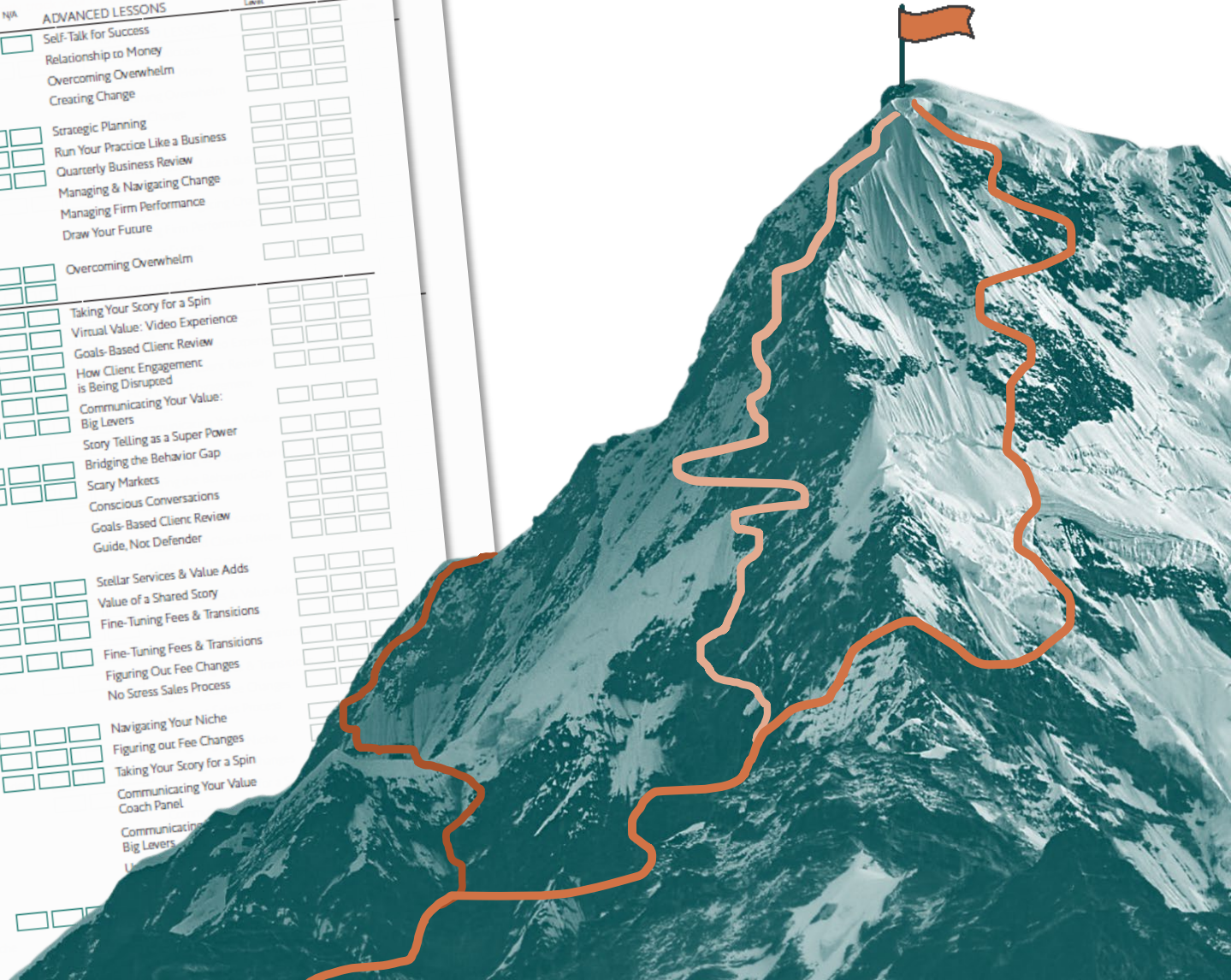
COACHING GUIDEMAP

Choose
Your
Adventure



YOUR GUIDEMAP Use this chart to easily track your progress through the Learning Paths each quarter.

Qtr	LEARNING PATHS	TRAILHEAD LESSONS	Priority Level	Complete	N/A	ADVANCED LESSONS	Priority Level	Complete	N/A
1	Mindset Mastery	The Science of Success	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Self-Talk for Success	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						Relationship to Money	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						Overcoming Overwhelm	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Performance Playbook	Business Planning	Your Vision for Success	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Strategic Planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		My Model Practice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Run Your Practice Like a Business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		Action and Accountability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Quarterly Business Review	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Delivering Deeper Value	Take Control of Your Time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Managing & Navigating Change	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		Take Control of Your Time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Managing Firm Performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		Action and Accountability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Draw Your Future	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Delivering Deeper Value	No Stress Prospect Process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Overcoming Overwhelm	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		Amazing First Meeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Taking Your Story for a Spin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		One-Page Financial Plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Virtual Value: Video Experience	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	School of Advice	Model Client Meetings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Goals-Based Client Review	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		Client Onboarding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	How Client Engagement is Being Disrupted	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		5-Star Service Model	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Communicating Your Value: Big Levers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Crafting Your Client Service Model	One-Page Financial Plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Story Telling as a Super Power	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		Amazing First Meeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bridging the Behavior Gap	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Scary Markets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	Setting and Sharing Fees	Client Meeting Surges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Conscious Conversations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		Finding Your Fee Model	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Goals-Based Client Review Guide, Not Defender	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Stellar Services & Value Adds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Communicating Your Value	Finding Your Fee Model	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Value of a Shared Story	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		5-Star Service Model	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Fine-Tuning Fees & Transitions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		Client Meeting Surges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Fine-Tuning Fees & Transitions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	Nailing Your Niche	Finding Your Fee Model	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Figuring Out Fee Changes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		Telling Your Story	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	No Stress Sales Process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Navigating Your Niche	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	Nailing Your Niche	Nailing Your Niche	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Figuring out Fee Changes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Taking Your Story for a Spin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Communicating Your Value Coach Panel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10	Nailing Your Niche	Nailing Your Niche	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Communicating Your Value Big Levers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	U	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



2023 RETREATS



JANUARY 23
Performance
Retreat



MARCH 6-8
Lifestyle Retreat

MARCH 7
Mastermind Meet Up

MARCH 9-10
Leaders Retreat



MAY 18-19
Leaders
Retreat



JUNE 12
Productivity
Retreat



AUGUST 21-23
Growth Retreat

August 24
Mastermind
Meet Up

AUGUST 24-25
Leaders Retreat

THE LEARNING JOURNEY



1

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

2

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

3

- Taking Back Your Time
- Client Meeting Surges
- High-Performance Happiness Habits
- Focus on Energy Creating

4

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



5

- No Stress Prospect Process
- Building your Brand
- Your Unique Value Proposition
- Telling your Story

6

- Rock Star Right Hand
- Performance Management
- Building & Managing Teams
- Hiring & Training
- Compensation Planning
- Org Strategy / Career Pathing

7

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

8

- Choosing Your Channels
- Marketing Implementation
- Digital Marketing
- Websites that Work
- Marketing Action Plan
- Cultivating COIs

9

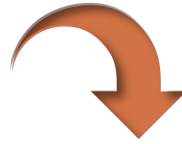
- Run Your Practice Like a Business
- Managing Firm Performance
- Action & Accountability

LIMITLESS

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Qr	LEARNING PATHS	TRAILHEAD LESSONS	Priority Level	Complete	N/A	ADVANCED LESSONS	Priority Level	Complete	N/A
1	Mindset Mastery	The Science of Success	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Self-Talk for Success Relationship to Money Overcoming Overwhelm Creating Change	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Business Planning	Your Vision for Success My Model Practice Action and Accountability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Strategic Planning Run Your Practice Like a Business Quarterly Business Review Managing & Navigating Change Managing Firm Performance Draw Your Future	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Taking Control of Your Time	Take Control of Your Time Action and Accountability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Overcoming Overwhelm	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Delivering Your Value	No Stress Prospect Process Amazing First Meeting One-Page Financial Plan Model Client Meetings Client Onboarding 5-Star Service Model	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Taking Your Story for a Spin Virtual Value: Video Experience Goals-Based Client Review How Client Engagement is Being Disrupted Communicating Your Value: Big Levers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	School of Advice	One-Page Financial Plan Amazing First Meeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Story Telling as a Super Power Bridging the Behavior Gap Scary Markets Conscious Conversations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Crafting Your Client Service Model	Finding Your Fee Model 5-Star Service Model Client Meeting Surges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Setting and Sharing Fees	Finding Your Fee Model	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Communicating Your Value	Nailing Your Niche Finding Your Fee Model Telling Your Story	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Nailing Your Niche	Nailing Your Niche	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Your Guidemap keeps you on track along your Learning Path



Delivering Your Value

OVERVIEW

Find your voice, communicate your value. Learn how to tell your story like a superhero, perfect your prospect process, nail your niche and continually reinforce your worth through goals-based performance reviews.

Trailhead Lessons



ONE-PAGE FINANCIAL PLAN

Your value is advice, not information. Avoid the confusion and crutch of relying upon thick plans by focusing instead on what matters most to clients. Refocus your agendas and elevate your client conversations with a simple yet powerful One-Page Plan.



NO STRESS PROSPECT PROCESS

Define the journey to reach the destination. Designing an engaging client journey—from interest to awareness to education to decision—helps you get the “yes” without the stress. Engage prospects more fully and clearly to demonstrate your value with a process that will help you retain the clients you want for your ideal practice.



CLIENT ONBOARDING



AMAZING FIRST MEETING

Better questions yield better answers. Build credibility and trust in your 1st meeting with prospects by elevating the conversations to quickly get to the heart of what matters most so that you can deliver truly

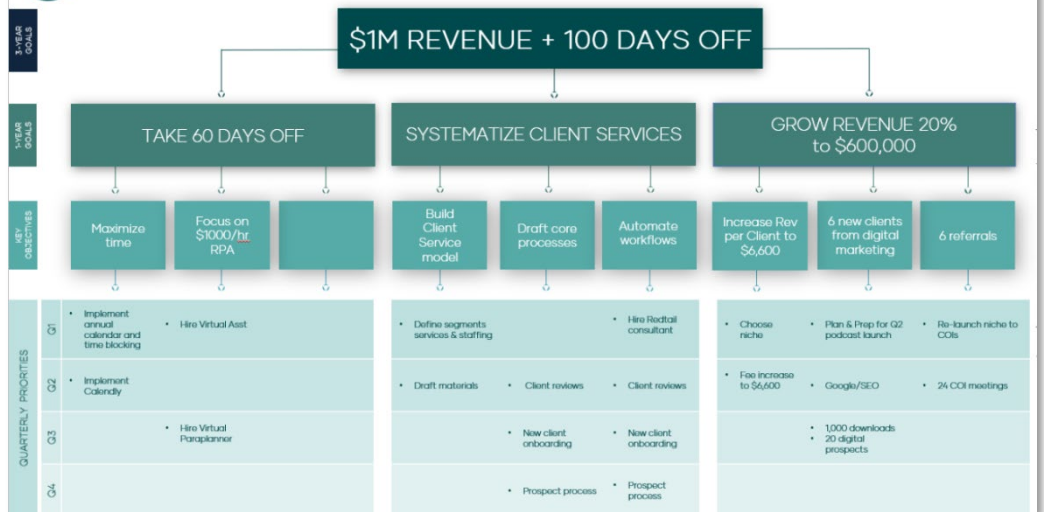
2023 LIMITLESS TRAIL GUIDE

PRACTICE TOOL: 1-PG BUSINESS PLAN

Q1 FOCUS: CLARITY AND ACCOUNTABILITY	Q2 FOCUS: DEFINING AND DELIVERING VALUE	Q3: SCALING YOUR SPECIAL	Q4 FOCUS: GEARING UP FOR GROWTH
<p>YOUR Q1 PRIORITIES</p> <ul style="list-style-type: none"> Create clear, 3-Year Vision Complete 1-Page Business Plan Power up Personal Productivity Implement Time/Productivity Models Mindset Awareness; Brain Training Schedule Launch Process <p>RELATED LESSONS</p> <ul style="list-style-type: none"> Vision Taking Back Your Time Action and Accountability <p>FIRM ACTION ITEMS</p> <ul style="list-style-type: none"> Insert Insert Insert <p>LEADERS ACTION ITEMS</p> <ul style="list-style-type: none"> Implement Time/Productivity actions Join February "Success Sprint" <p>TEAM ACTION ITEMS</p> <ul style="list-style-type: none"> Implement noted actions 	<p>YOUR Q2 PRIORITIES</p> <ul style="list-style-type: none"> Insert your BIG (Big Important Goals) Note additional priorities 'Slow is Smooth, Smooth is Fast' If it's good enough for the Navy Seals, it's good enough for you! <p>RELATED LESSONS</p> <ul style="list-style-type: none"> <p>FIRM ACTION ITEMS</p> <ul style="list-style-type: none"> <p>LEADERS ACTION ITEMS</p> <ul style="list-style-type: none"> <p>TEAM ACTION ITEMS</p> <ul style="list-style-type: none"> 	<p>YOUR Q3 PRIORITIES</p> <ul style="list-style-type: none"> Insert your BIG (Big Important Goals) Note additional priorities What essential priorities will 'move the needle' this quarter? Focus is your friend! <p>RELATED LESSONS</p> <ul style="list-style-type: none"> <p>FIRM ACTION ITEMS</p> <ul style="list-style-type: none"> <p>LEADERS ACTION ITEMS</p> <ul style="list-style-type: none"> <p>TEAM ACTION ITEMS</p> <ul style="list-style-type: none"> 	<p>YOUR Q4 PRIORITIES</p> <ul style="list-style-type: none"> Insert your BIG (Big Important Goals) 2024 Strategic Planning Note Additional Priorities Finish Strong! <p>RELATED LESSONS</p> <ul style="list-style-type: none"> <p>FIRM ACTION ITEMS</p> <ul style="list-style-type: none"> <p>LEADERS ACTION ITEMS</p> <ul style="list-style-type: none"> <p>TEAM ACTION ITEMS</p> <ul style="list-style-type: none">

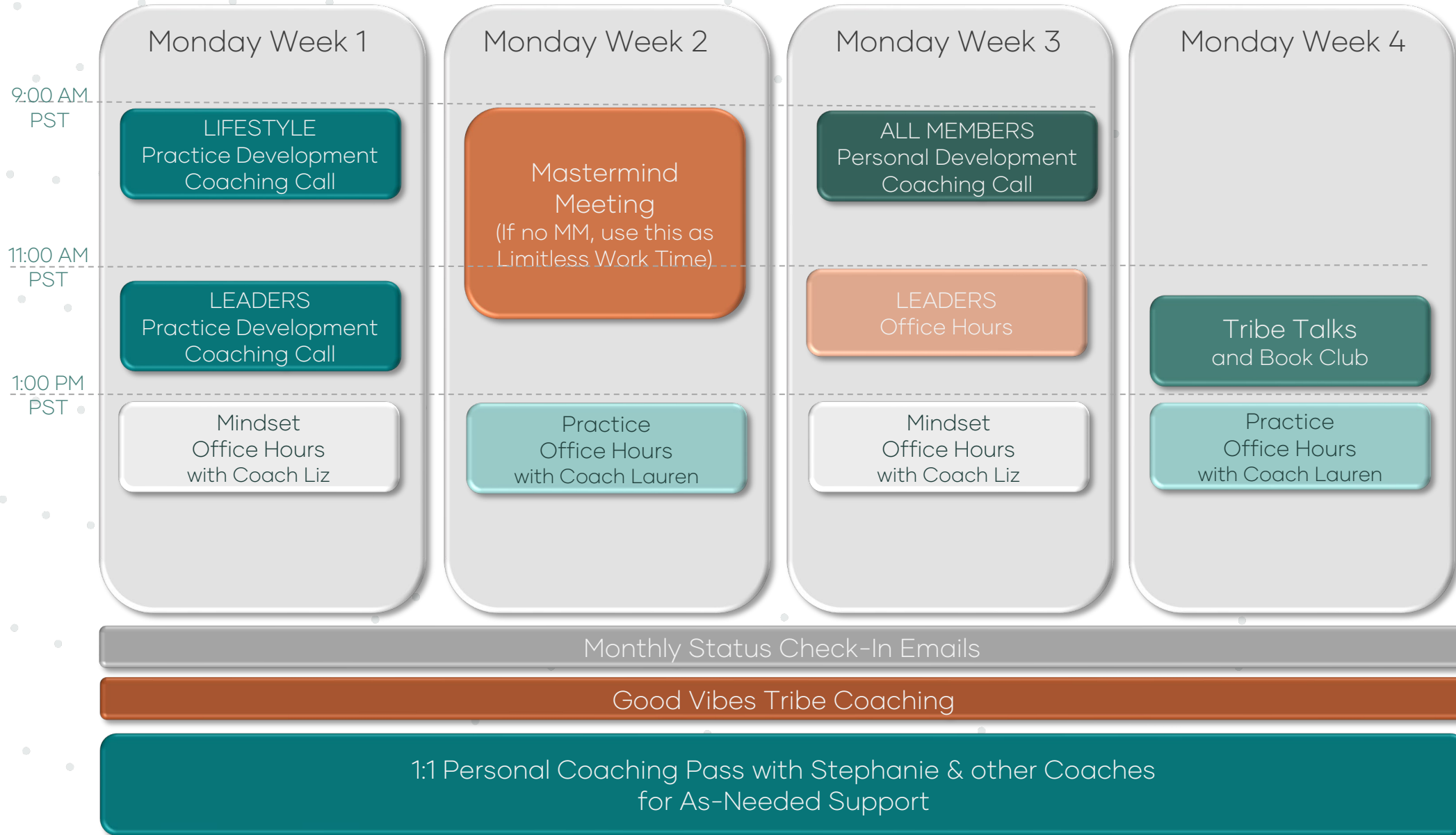


20__ 1-Page Business Plan



Trailhead / Advanced Climb Lessons and Action Items help you progress toward your Goals

ENGAGEMENT MODEL



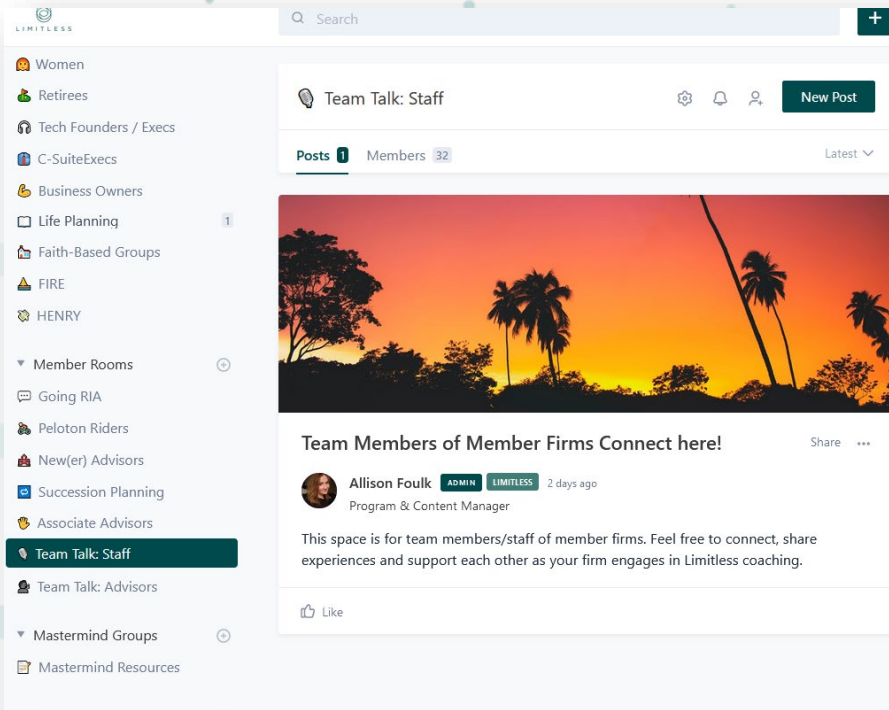
WHO GOES WHERE?

Leaders & Leaders Co-Members:
 Leaders Practice Development Calls, Leaders Office Hours & All Member Personal Development Calls

Leader Team Members:
 Lifestyle Calls, Practice & Mindset Office Hours

For Team Members

Team Member Call Cheat sheet



Use **Teams ONLY Discussion Space**, where key team members can talk shop, share resources and get pointers from Limitless Team alumni who have walked your trail before.

Team Member Call Cheat Sheet

FOR DESIGNATED TEAM MEMBERS ONLY

Welcome to Limitless! You're invited to attend our bi-monthly coaching calls, on both practice and personal development, as well as our weekly office hours. Attend as many calls as you and your advisor feel are helpful. On our website, you'll find lesson videos, resources, and reading that will support your efforts this year. Also, be sure to log in to the Good Vibes Tribe and join the Team room so that you can connect with other stellar teams as they share both best practices and in-practice tips.

CALL LINKS:
LIFESTYLE PROGRAM KICK-OFF CALL
January 9, 2023 (9-9:45 PST)
Join via this Limitless Call Line: [ZOOM link](#)

COACHING CALLS
1st and 3rd Mon. of month (9-10:30 PST)
Week 1: Practice Development; Week 3: Personal Development
Join via this Limitless Call Line: [ZOOM link](#)

OFFICE HOURS
Every Mon. of month (1:00 - 2:00 PST)
Week 1 & 3: Personal Development; Week 2 & 4: Practice Development
Join via this Limitless Call Line: [Zoom link](#)

WEBSITE & TRIBE LINKS:
LEARNING CENTER: [Member Website](#)
COACHING CENTER: [Good Vibes Tribe](#)

Our Service Standards:
Email coaching@limitlessforlife.com and we will respond to your email within 24 hours on business days. If urgent, call [786-779-8886](tel:786-779-8886).

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- Join calls to LISTEN IN AND LEARN.
- USE THESE LINKS to join calls (NOT the member invite link to join calls).
- We monitor ADVISOR ATTENDANCE, and this keeps the data clean. (Thank you!)



YOUR Q1 TRAIL GUIDE

This is your roadmap for moving through your Q1 climb.



Performance Virtual Workshop Retreat
01.23



First Mastermind Group Call
02.6

01.9-01.20
Complete Base Camp Learning Path Lessons



01.23-03.03
Lifestyle Member Roadmap Calls



01.23-03.03
Implement & Apply Base Camp Lessons



1 Your GuideMap

Keeps you on track along your Learning Path

YOUR GUIDEMAP Use this chart to easily track your progress through the Learning Paths each quarter.

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			Level	Complete	N/A		Level	Complete	N/A			
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			Business Planning	Your Vision for Success My Model Practice Action and Accountability	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	Strategic Planning Run Your Practice Like a Business Quarterly Business Review Managing & Navigating Change Managing Firm Performance Draw Your Future	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2 Your Coaching Trail Guide

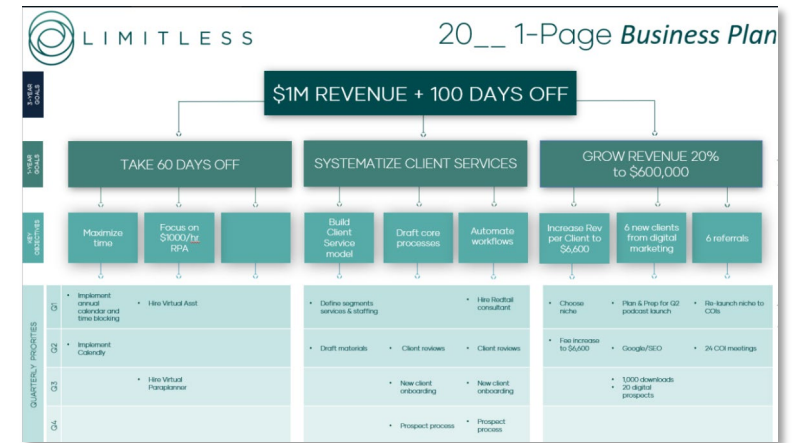
Keeps you on track along your Learning Path

2023 LIMITLESS TRAIL GUIDE
PRACTICE TOOL: 1-PG BUSINESS PLAN

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3 Your 1-Page Business Plan

Clarifies and centralizes your business priorities



4 The Limitless Website

Clarifies and centralizes your business priorities

Delivering Your Value

OVERVIEW

Find your voice, communicate your value. Learn how to tell your story like a superhero, perfect your prospect process, nail your niche and continually reinforce your worth through goal-based performance reviews.

Trailhead Lessons

- ONE-PAGE FINANCIAL PLAN**

Your value is advice, not information. Avoid the confusion and crutch of relying upon thick plans by focusing instead on what matters most to clients. Refocus your agendas and elevate your client conversations with a simple yet powerful One-Page Plan.
- NO STRESS PROSPECT PROCESS**

Define the journey to reach the destination. Designing an engaging client journey—from interest to awareness to education to decision—helps you get the "yes" without the stress. Engage prospects more fully and clearly to demonstrate your value with a process that will help you retain the clients you want for your ideal practice.
- CLIENT ONBOARDING**
- AMAZING FIRST MEETING**

Better questions yield better answers. Build credibility and trust in your 1st meeting with prospects by elevating the conversations to quickly get to the heart of what matters most so that you can deliver truly

STOP! DO NOT PASS GO...

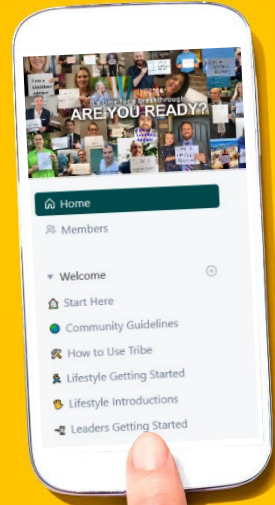
UNTIL YOU HAVE:

- ✓ Completed your Enrollment Form & Your Getting to Know You Form
- ✓ Added coaching@limitlessfa.life to your safe sender list in your email
- ✓ Committed to reading our biweekly Inbox Insights
- ✓ Started on your Base Camp Learning Path lessons and action items



QUESTIONS?

GOOD VIBES TRIBE



Get ready to
get Limitless.

THE LIMITLESS MEMBER SITE COACHING CENTER

TESTLEADERS2022 TEST

ACCOUNT

CALENDAR

COACHING CENTER ▾

COACHING CALLS

OFFICE HOURS

MASTERMINDS

SUPPORT

LEARNING CENTER ▾

GOOD VIBES TRIBE

LOGOUT

PROGRAM OUTLINE

CLARITY & ACCOUNTABILITY

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

COMMUNICATING YOUR VALUE

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

VALUE U: DELIVERING DEEPER VALUE

- ACCOUNT
- CALENDAR
- COACHING CENTER ▾
 - COACHING CALLS
 - OFFICE HOURS
 - MASTERMINDS
- LEARNING CENTER ▾
 - LEARNING PATHS
 - LESSONS
 - LIBRARY
 - STRATEGIC PARTNERS
- GOOD VIBES TRIBE
- LOGOUT

Learning Paths

Learning paths bundle related courses into a specialized learning series with defined goals.

Search Sort by

Lessons

Sort by 1 - 20 of 97

Search

Categories

- Growth (5)
- Advice and Planning (7)
- Personal Productivity (5)
- Client Service (7)
- Planning & Performance (2)
- Operations (3)
- People (5)

RESET

YOUR VISION OF SUCCESS

EXPAND YOUR PERSPECTIVE & EXPLORE THE POSSIBILITIES

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

ACTION STEPS RESOURCES READING LIST

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

ALLISON FOULK

COURSE OUTLINE

HOME

ACCOUNT

CALENDAR

COACHING CENTER ▾

LEARNING CENTER ▾

GOOD VIBES TRIBE

ADMIN ONLY ▾

LOGOUT



LIMITLESS

← Back to Lifestyle Accountability Room

- Leaders Private Lounge
- Leaders Office Hours
- Coaching Corner
 - Lifestyle Accountability Ro... 1**
 - Events & Tribe Talks 1
 - Reading Room & Book Club
 - Share Big Wins 1
 - Lifestyle Office Hours 7
 - Coaching Check-Ins
- Topic Rooms
- Niche Groups
- FOUNDERS CLUB EXCLUSIVE
- Member Rooms
- Mastermind Groups
 - Mastermind Resources

WHAT'S YOUR Big Why

Your Big Why

Share ...

Allison Foulk **ADMIN** **LIMITLESS** a minute ago
Program & Content Manager

Kick off your 2023 coaching year by sharing your BIG WHY here.

Like

Welcome Package



THE ANNUAL CALENDAR

SET YOUR VISION SCHEDULE FOR 2023



THE POST ITS & PARTY HORN

STAY CLEAR AND FOCUSED TO ELIMINATE DISTRACTIONS...



...UNLESS YOU HAVE A BIG WIN TO CELEBRATE!

JANUARY							FEBRUARY							MARCH							APRIL								
SUN	MON	TUE	WED	THUR	FRI	SAT	SUN	MON	TUE	WED	THUR	FRI	SAT	SUN	MON	TUE	WED	THUR	FRI	SAT	SUN	MON	TUE	WED	THUR	FRI	SAT		
1	2	3	4	5	6	7	5	6	7	8	9	10	11	5	6	7	8	9	10	11	2	3	4	5	6	7	8		
8	9	10	11	12	13	14	12	13	14	15	16	17	18	12	13	14	15	16	17	18	9	10	11	12	13	14	15		
15	16	17	18	19	20	21	19	20	21	22	23	24	25	19	20	21	22	23	24	25	16	17	18	19	20	21	22		
22	23	24	25	26	27	28	26	27	28	26	27	28	29	30	31	23	24	25	26	27	28	29	23	24	25	26	27	28	29
29	30	31	26	27	28	26	27	28	29	30	31	30																	

MAY							JUNE							JULY							AUGUST						
SUN	MON	TUE	WED	THUR	FRI	SAT	SUN	MON	TUE	WED	THUR	FRI	SAT	SUN	MON	TUE	WED	THUR	FRI	SAT	SUN	MON	TUE	WED	THUR	FRI	SAT
1	2	3	4	5	6	4	5	6	7	8	9	10	2	3	4	5	6	7	8	5	6	7	8	9	10	11	
7	8	9	10	11	12	13	11	12	13	14	15	16	17	9	10	11	12	13	14	15	12	13	14	15	16	17	18
14	15	16	17	18	19	20	18	19	20	21	22	23	24	16	17	18	19	20	21	22	19	20	21	22	23	24	25
21	22	23	24	25	26	27	25	26	27	28	29	30	23	24	25	26	27	28	29	26	27	28	29	30	31		
28	29	30	31	25	26	27	28	29	30	30	31																

SEPTEMBER							OCTOBER							NOVEMBER							DECEMBER							
SUN	MON	TUE	WED	THUR	FRI	SAT	SUN	MON	TUE	WED	THUR	FRI	SAT	SUN	MON	TUE	WED	THUR	FRI	SAT	SUN	MON	TUE	WED	THUR	FRI	SAT	
3	4	5	6	7	8	9	8	9	10	11	12	13	14	5	6	7	8	9	10	11	3	4	5	6	7	8	9	
10	11	12	13	14	15	16	15	16	17	18	19	20	21	12	13	14	15	16	17	18	10	11	12	13	14	15	16	
17	18	19	20	21	22	23	22	23	24	25	26	27	28	19	20	21	22	23	24	25	17	18	19	20	21	22	23	
24	25	26	27	28	29	30	29	30	31	26	27	28	29	30	24	25	26	27	28	29	30	24	25	26	27	28	29	30

Success Shifts

- ELEVATE YOUR THINKING
- DESIGN YOUR MODEL PRACTICE
- TAKE CHARGE OF YOUR TIME
- BE CLIENTS' TRUSTED ADVISOR
- DEFINE & PACKAGE YOUR VALUE
- COMMUNICATE YOUR VALUE WITH CONFIDENCE
- STAFF FOR SUCCESS
- SYSTEMATIZE & SPECIALIZE SYSTEMS
- FIND YOUR GROWTH GROOVE

Beginner Trail Lessons

- Science of Success
- Your Vision for Success
- My Model Practice
- Action & Accountability
- Taking Control of Your Time
- Nailing Your Niche
- Telling Your Story
- Finding Your Fee Model
- No Stress Prospect Process
- One-Page Financial Plan
- Client Onboarding
- 5-Star Service Model
- Model/Client Meetings
- Client Meeting Surges
- Referral Roadmap
- Rock Star Right Hand
- Optimizing Operations
- Choosing Your Channel
- Building a Glowout Brand
- Mapping Your Marketing Plan
- Cultivating COIs
- Client Referrals
- Websites that Work

LIMITLESS 2023

2023 GOALS

Work Hrs/Week _____

Days OOO _____

of Ideal Clients _____

Revenue _____

AUM _____

Avg Rev/Client _____

PERFORMANCE RETREAT

(virtual)

AGENDA

January 23, 2023

> Performance Playbook Welcome	8:30 AM-8:45 AM
> Science of Success	8:45 AM-10:30 AM
> Performance Playbook Overview & Vision/My Model Practice Workshop	11:15 AM-1:15 PM
> Time and Action & Accountability Workshop	1:30 PM-3:00 PM
> Closing: Your Retreat Roadmap	3:00 PM-3:45 PM

January 23, 2023

Be sure to complete your 60-second registration in next week's Inbox Insights.

Got teams? Share the Team Invite PDF with them (also in next Inbox Insights!)

The screenshot shows the top portion of a website for a virtual retreat. At the top left is the 'LIMITLESS' logo, consisting of a circular icon with three concentric lines and the word 'LIMITLESS' in a sans-serif font. To the right of the logo are links for 'Summary' and 'FAQ', and a prominent orange button labeled 'Register Now'. Below the navigation is a large hero image of a mountainous landscape with a rocky cliffside in the foreground. Overlaid on the image is the text '2023 Performance Playbook Virtual Retreat' in a large, white, serif font. Below this, the date and time 'January 23, 2023 8:30 AM-3:30 PM PT' are displayed in a smaller white font. At the bottom of the page, there is a paragraph of text describing the retreat's focus on success science, vision, and accountability, mentioning advisor coaches Adam, Tiffany, Jarrod, Lauren, and Liz. Below the text are four circular progress indicators, each with a number inside: 22, 20, 36, and 37.

LIMITLESS

Summary FAQ Register Now

2023 Performance Playbook Virtual Retreat

January 23, 2023
8:30 AM-3:30 PM PT

Dive into the powerful concepts behind the science of success, crafting your vision for success, increasing your accountability, and taking control of your biggest asset: your time. Advisor Coaches Adam, Tiffany, Jarrod, Lauren & Liz join Stephanie for a day that promises to deliver both best practice know-how and in-the-trenches in-practice tips. Come ready to workshop drafts of your 1-Page Business Plan, My Model Practice Activity, Model Calendar and Success Shifter. This is where the rubber meets the road...

22 20 36 37



DON'T GET
OVERWHELMED



DO GET
ORGANIZED

YOUR GUIDEMAP Use this chart to easily track your progress through the Learning Paths each quarter.

LEARNING PATHS	TRAILHEAD LESSONS	Priority			ADVANCED LESSONS	Priority		
		Level	Complete	N/A		Level	Complete	N/A
1 Mindset Mastery	The Science of Success	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Self-Talk for Success	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Relationship to Money	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Overcoming Overwhelm	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business Planning	Your Vision for Success	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Strategic Planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	My Model Practice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Run Your Practice Like a Business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Action and Accountability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Quarterly Business Review	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Taking Control of Your Time	Take Control of Your Time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Managing & Navigating Change	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Action and Accountability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Managing Firm Performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Draw Your Future	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2 Delivering Your Value	No Stress Prospect Process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Overcoming Overwhelm	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Amazing First Meeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Taking Your Story for a Spin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	One-Page Financial Plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Virtual Value: Video Experience	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
School of Advice	Model Client Meetings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Goals-Based Client Review	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Client Onboarding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	How Client Engagement is Being Disrupted	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	5-Star Service Model	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Communicating Your Value: Big Levers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Crafting Your Client Service Model	One-Page Financial Plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Story Telling as a Super Power	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Amazing First Meeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bridging the Behavior Gap	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Scary Markets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Securing and Scaling Your Value	Client Meeting Surges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Conscious Conversations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Client Meeting Surges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Goals-Based Client Review	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Client Meeting Surges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Guide Your Defender	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communicating Your Value	Client Meeting Surges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Communicating Your Value: Big Levers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Client Meeting Surges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Unique Value Proposition	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Client Meeting Surges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Story Telling as a Super Power	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nailing Your Niche	Client Meeting Surges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Marketing Your Niche	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Client Meeting Surges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Navigating Your Niche	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Client Meeting Surges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	How to Shift Your Niche with Success	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**GET CLEAR
GET FOCUSED
GET TO WORK**

LIMITLESS 20__ 1-Page Business Plan

\$1M REVENUE + 100 DAYS OFF

LEAD	TAKE 60 DAYS OFF	SYSTEMATIZE CLIENT SERVICES	GROW REVENUE 20% to \$600,000
LEAD	Maximize Time	Build Client Service model	Increase Rev per Client to \$6,000
LEAD	Focus on \$1000/hr QRA	Draft core processes	4 new clients from digital marketing
LEAD		Automate workflows	6 referrals
Q1	Implement annual calendar and time blocking	Define segments services & staffing	Choose niche
Q1		1 Hire Virtual Assistant	Plan & Prep for Q2 postpaid launch
Q2	Implement Calendar	Draft materials	File increase to \$6,000
Q2		Client reviews	Google/SEO
Q3	1 Hire Virtual Receptionist	New client onboarding	2K CCR meetings
Q3		New client onboarding	1000 downloads
Q4		Prospect process	20 digital prospects

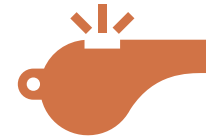
WHERE
TO
GO
FOR ...



GENERAL QUESTIONS



COACHING@LIMITLESSFA.LIFE



COACHING

Your Team
(virtual program)

[WEEKLY OFFICE HOURS](#)

[GOOD VIBES TRIBE](#)

YOU

LEADERS@LIMITLESSFA.LIFE



LESSONS / RESOURCES



members.LimitlessFa.life

WHAT HAVE YOU BUILT?

Lifestyle
Practice

Founder
dependent

"succeed & serve"

Successful
Firm

Founder-Partner
Driven

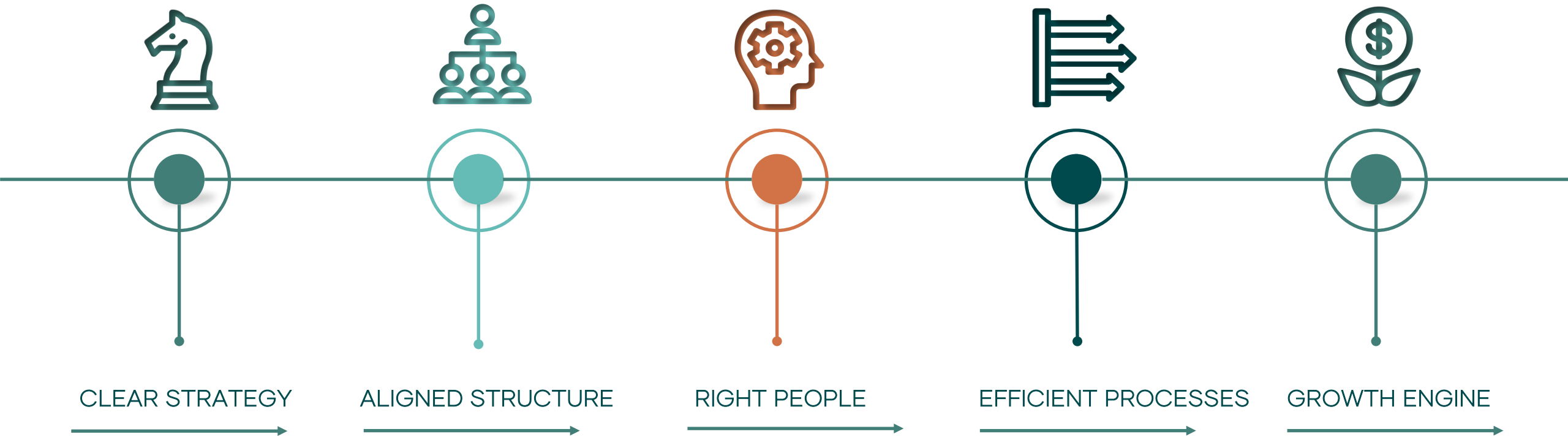
"scaling growth"

Autonomous
Business

Independent,
Transferable
Operations
& Value

WHAT DO YOU ASPIRE TO BUILD?

A WORKING MODEL FOR SUCCESS



THE LIMITLESS MODEL

CLEAR STRATEGY

MINDSET

VISION

TIME

CLIENT MODEL



STAFFING



OPERATIONS



GROWTH

BASE CAMP LESSONS



Q1 STRATEGY & COACHING CALL

ALIGN YOUR BUSINESS PLAN AND COACHING ROADMAP



Key Observations



Vision & Goals Planning & Accountability Personal Performance



Roadmap for Change

2023 LIMITLESS TRAIL GUIDE
PRACTICE TOOL: 1-PG BUSINESS PLAN

Q1 FOCUS: CLARITY AND ACCOUNTABILITY

YOUR Q1 PRIORITIES

- Create clear, 3-Year Vision
- Complete 1-Page Business Plan
- Power up Personal Productivity
- Implement Time/Productivity Models
- Mindset Awareness, Brain Training
- Schedule Launch Process

Q2 FOCUS: DEFINING AND DELIVERING VALUE

YOUR Q2 PRIORITIES

- Insert your BIG (Big Important Goals)
- Note additional priorities
- 'Slow is Smooth, Smooth is Fast'
- If it's good enough for the Navy Seals, it's good enough for you!

Q3: SCALING YOUR SPECIAL

YOUR Q3 PRIORITIES

- Insert your BIG (Big Important Goals)
- Note additional priorities
- What essential priorities will 'move the needle' this quarter?
- Focus is your friend!

Q4 FOCUS: GEARING UP FOR GROWTH

YOUR Q4 PRIORITIES

- Insert your BIG (Big Important Goals)
- 2024 Strategic Planning
- Note Additional Priorities
- Finish Strong!

YOUR GUIDEMAP Use this chart to easily track your progress through the Learning Paths each quarter.

LEARNING PATHS	TRAILHEAD LESSONS	Priority	Complete	N/A	ADVANCED LESSONS	Priority	Complete	N/A
1 Mindset Mastery	The Science of Success				Self-Talk for Success Relationship to Money Overcoming Overwhelm Creating Change			
Business Planning	Your Vision for Success My Model Practice Action and Accountability				Strategic Planning Run Your Practice Like a Business Quarterly Business Review Managing & Navigating Change Managing Firm Performance Draw Your Future			
2 Taking Control of Your Time	Take Control of Your Time Action and Accountability				Overcoming Overwhelm			
Delivering Your Value	No Stress Proposed Process Amazing First Meeting One-Page Financial Plan Model Client Meetings Client Onboarding 5-Star Service Model				Taking Your 'Story' for a Spin Virtual Value: Video Experience Goals-Based Client Review How Client Engagement is Being Disrupted Communicating Your Value: Big Levers Scary Telling as a Super Power Bridging the Behavior Gap Scary Markets Conscious Conversations Goals-Based Client Review Nine Defenders			
Delivering Deeper Value	One-Page Financial Plan Amazing First Meeting							
School of Advice								
Crafting Your Client Service Model								
Seeing and Sharing for								
Communicating Your Value								
Nailing Your N								

LIMITLESS 20__ 1-Page Business Plan

\$1M REVENUE + 100 DAYS OFF

- TAKE 60 DAYS OFF
 - Maximize time
 - Focus on \$1000/hr RFA
- SYSTEMATIZE CLIENT SERVICES
 - Build Client Service Model
 - Draft core processes
 - Automate workflows
- GROW REVENUE 20% to \$600,000
 - Increase Rev per Client to \$6,000
 - 5 new clients from digital marketing
 - 6 referrals

QUARTERLY PRIORITIES

Quarter	Priority
Q1	Implement annual contracts and time blocking
Q2	Implement Cliently
Q3	Implement Cliently
Q4	Implement Cliently

Q&A





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LEADERS MASTERMIND MEET & GREET
• 11:45 – 12:45 PM PT

MEET YOUR MASTERMIND

SOME OF THE MOST SUCCESSFUL PEOPLE IN HISTORY HAVE USED MASTERMIND GROUPS TO:



CLARITY

*Stay Clear & Focused
Your peer group helps you maintain clarity of thought and stay focused on the right priorities*



COLLABORATION

*Raise the Bar & Get Results
Connect with like-minded peers to collaborate and coach each other to new heights.*



ACCOUNTABILITY

No Place to Hide

Watch Mastermind Training Video & Resources

Mastermind Meet & Greet

LEADERS

11:00 Leaders Kick-off

11:45 Mastermind Meet Up

1

SHARE AND CONNECT

- Share your Big Why and Goals for the year
- Share top 3 areas of focus to improve and grow

2

SELECT A MASTERMIND NAME

- Select team name and email to coaching@limitlessFA.life
- Exchange contact information

3

COMPLETE YOUR 2023 MASTERMIND ROLE CALENDAR

- Identify Members: 1 (youngest) – 5 (oldest) and update Role Calendar
- Define what your timer interruption will be, and all members agree to respect it
- Update in Mastermind Agenda & Forms (Google sheet)

4

CONFIRM MASTERMIND CALL DATES & TIME

- Second Monday of each month from 9-11:30 AM PT, 30 minutes per member
- Someone take responsibility for Zoom invites
- Add Coaching@limitlessfa.life to all invites (for check ins)

5

PREP FOR SUCCESS

- Each member share & update MM Agenda & Form, Goals tab
- Confirm Mastermind Meetings on Calendar
- Send out Zoom invites
- Schedule Friday Check Ins and Mastermind Meet Prep (5 mins)
- Ensure you have access to Tribe & Dropbox folders

