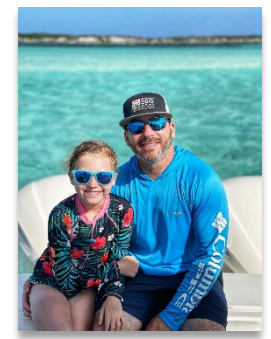
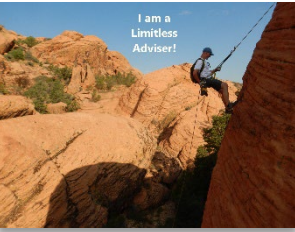
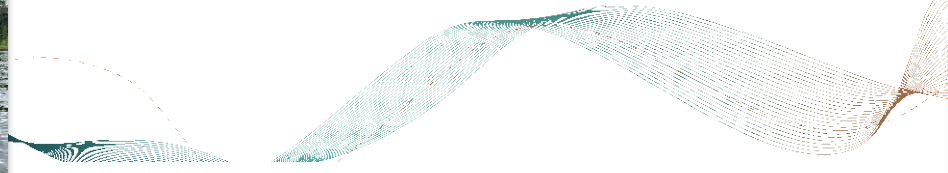
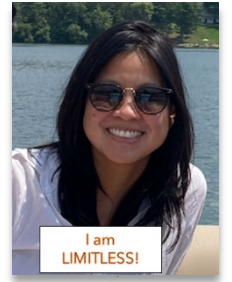
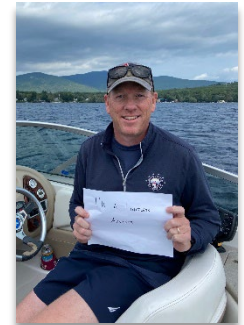
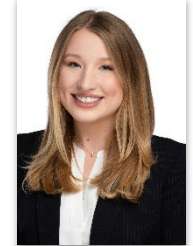




LIMITLESS LIFESTYLE

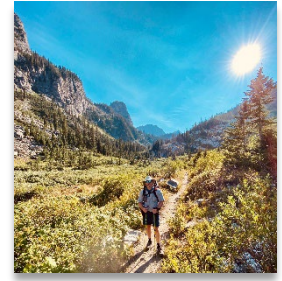
CLASS OF 2023

Kickoff Call | January 9, 2023



CLASS OF 2023

Kickoff Call | January 9, 2023



WHY ARE YOU HERE?

(TODAY, WE'RE HERE TO SHOW YOU HOW TO MAKE THE MOST OF LIMITLESS)

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

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



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

OR, WHATEVER YOUR DEFINITION OF LIVING THE 5 FREEDOMS MEANS TO YOU.



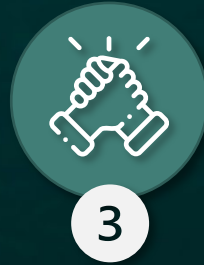
1

WORK WITH
PURPOSE, ON
YOUR TERMS



2

FOCUS YOUR
TIME & ENERGY
ON WORK YOU
LOVE



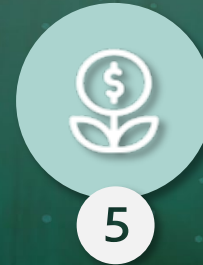
3

WORK WITH
PEOPLE YOU
TRULY ENJOY



4

ENJOY ALL THE
FINANCIAL
SUCCESS YOU
DESIRE



5

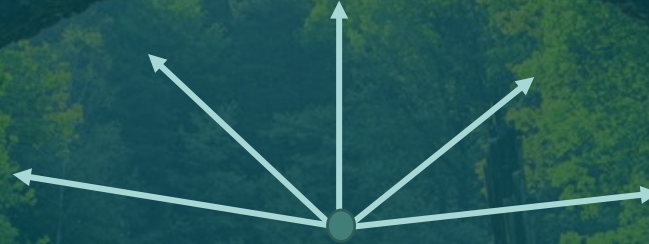
EXPERIENCE A LIFE
OF HAPPINESS,
CONTRIBUTION &
FULFILLMENT

LIMITLESS

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





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.

LIMITL



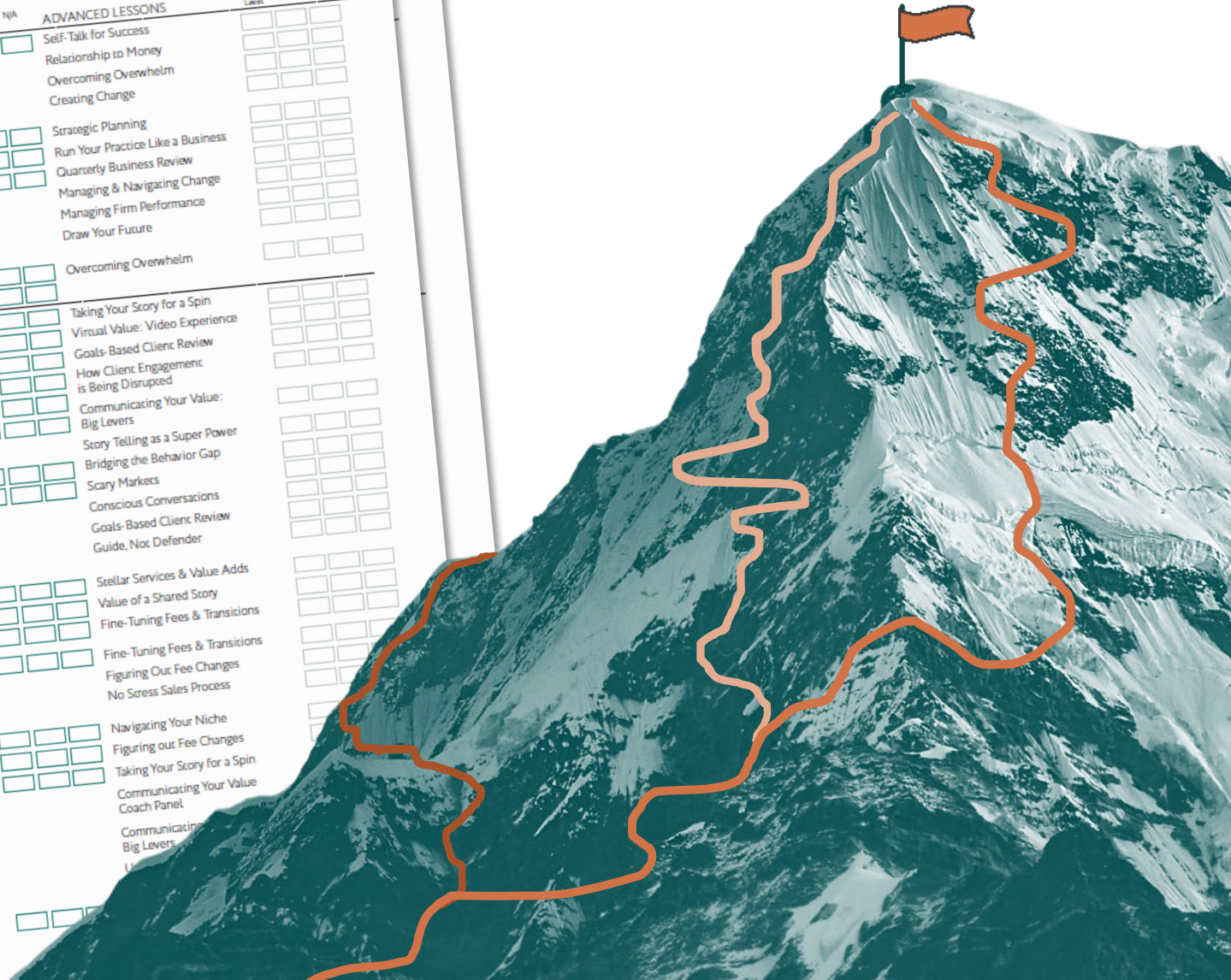
COACHING GUIDEMAP

Choose
Your
Adventure



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

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	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>								
						Relationship to Money											
						Overcoming Overwhelm											
						Creating Change											
Business Planning	Your Vision for Success My Model Practice Action and Accountability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Strategic Planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>									
					Run Your Practice Like a Business												
					Quarterly Business Review												
					Managing & Navigating Change												
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 Deeper 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	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
					Virtual Value: Video Experience												
					Goals-Based Client Review												
How Client Engagement is Being Disrupted																	
School of Advice	One-Page Financial Plan Amazing First Meeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Communicating Your Value: Big Levers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>									
					Story Telling as a Super Power												
					Bridging the Behavior Gap												
					Scary Markets												
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"/>	Conscious Conversations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>									
					Goals-Based Client Review												
					Guide, Not Defender												
					Stellar Services & Value Adds												
Setting and Sharing Fees	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"/>									
					Fine-Tuning Fees & Transitions												
					Fine-Tuning Fees & Transitions												
					Figuring Out Fee Changes												
Communicating Your Value	Nailing Your Niche Finding Your Fee Model 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"/>									
					Navigating Your Niche												
					Figuring out Fee Changes												
					Taking Your Story for a Spin												
Nailing Your Niche	Nailing Your Niche	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Communicating Your Value Coach Panel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>									
					Communicating Big Levers												



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 MAP



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

THE WORKING MODEL

CLEAR STRATEGY

MINDSET

VISION

TIME

CLIENT MODEL



STAFFING



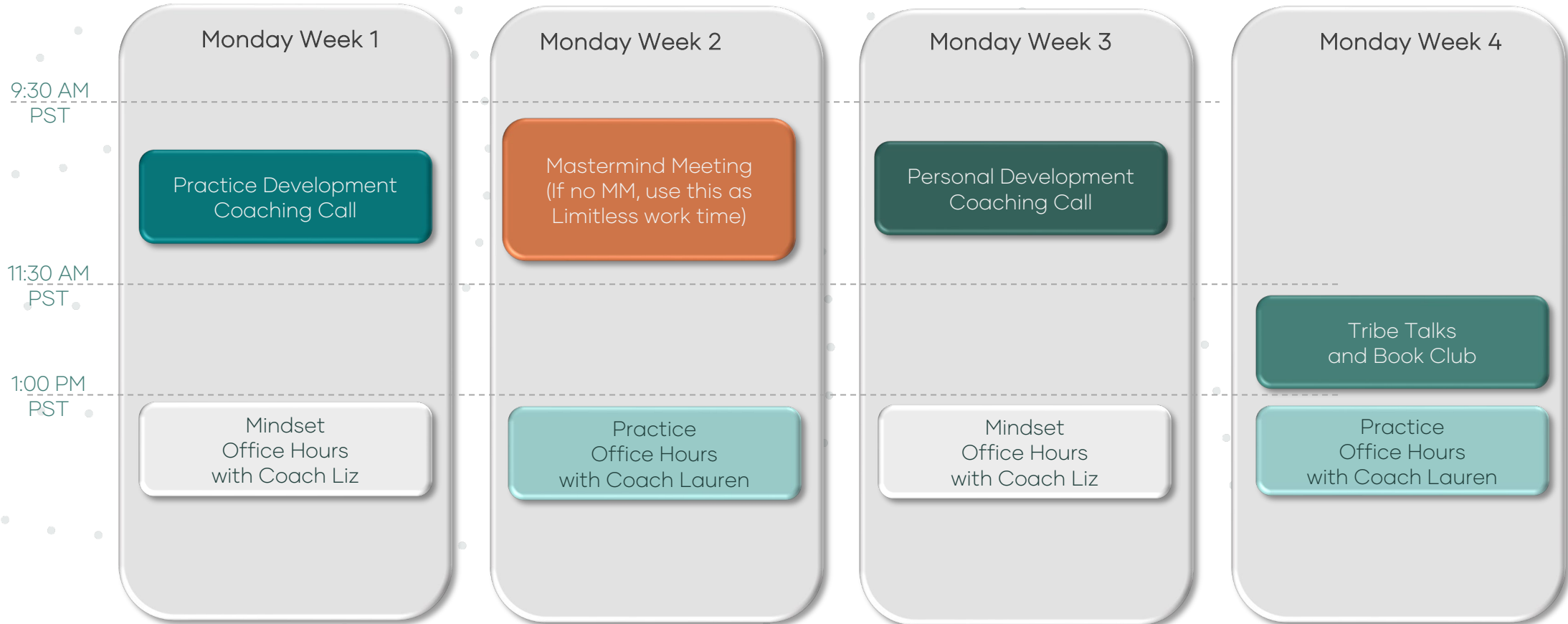
OPERATIONS



GROWTH

BASE CAMP LESSONS

COACHING SUPPORT



Monthly Status Check-In Emails

Good Vibes Tribe Coaching

LIFESTYLE LIVE COACHING SUPPORT:

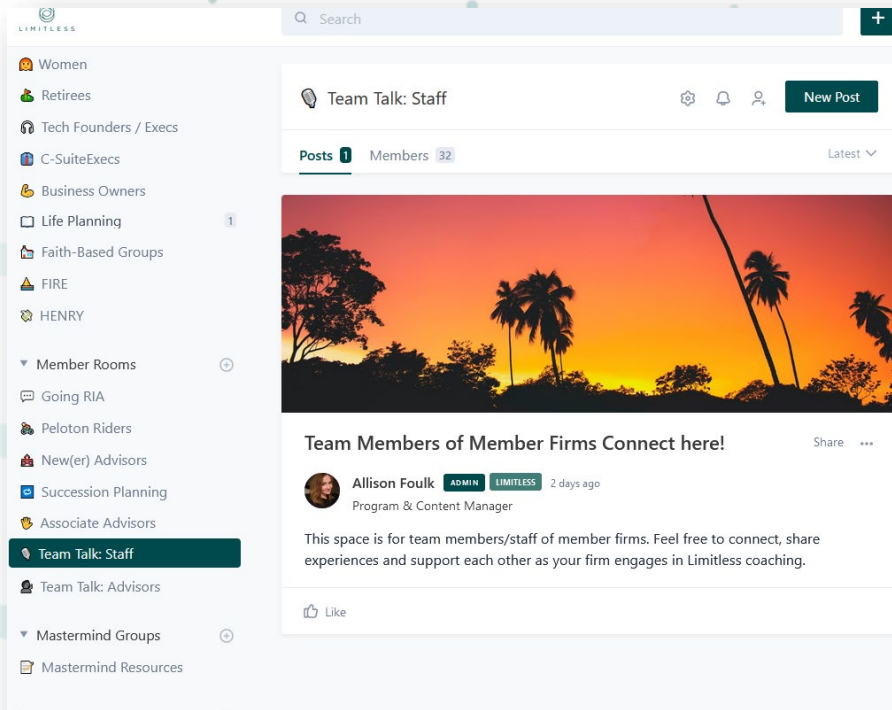
1:1 Personal Coaching Pass – here to support you!

LIFESTYLE VIRTUAL/LEGACY COACHING SUPPORT:

Weekly Office Hours

For Team Members

Team Members: Call 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 business days. If urgent, call [786-779-8886](tel:786-779-8886).

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Attendance Policy:

- Join calls to LISTEN IN AND LEARN.
- USE THESE LINKS to join calls NOT the member invite links!
- 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
02.13

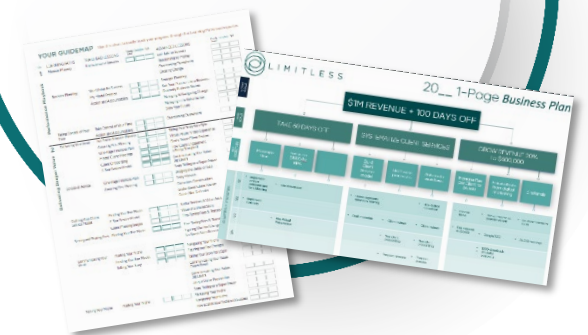
01.09-01.20
Complete Base Camp Learning Path Lessons



01.23-03.03
Lifestyle Member Roadmap Calls

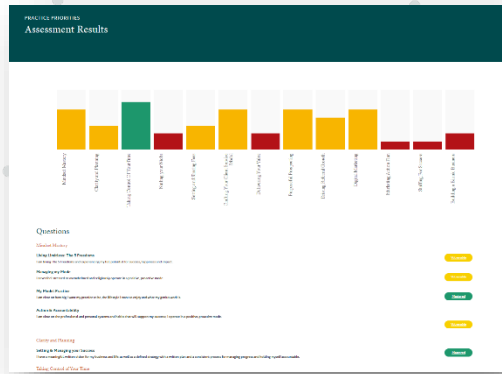


01.23-03.03
Implement & Apply Base Camp Lessons





ROADMAP CALL



MEMBER ROADMAP CALL
MODEL AGENDA

Lifestyle Model Agenda

- 5 min
- 5 min
- 10 min
- 10 min
- 15 min

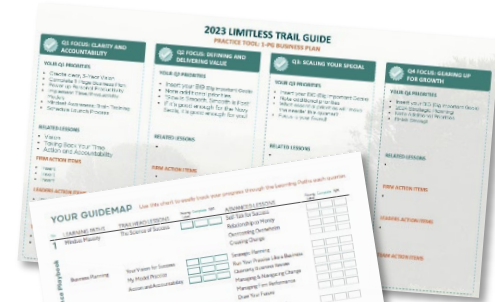
First 5
Welcome
• Our Agenda
• Your Agenda

5-15
Vision & Goals
When the vision is clear, the decisions are easier.
• We'll review your Big Why, 2-year Vision Statement, and talk through how these translated into your long business plan for this year.

15-30
Priority Diagnostic
You can't manage what you can't measure
• Your self-assessment helps us understand the gaps we need to fill and work on which priorities will be most impactful this year.
• Then, we'll quickly identify your focus for March: Retailer, lessons and 1:1 sessions.

30-40
Time/Personal Productivity
Time is your greatest revenue-producing asset
• We'll do a quick check-in to see how you're coming on Duxie Camp lesson work - review your annual calendar, model schedules, Daily Routine and Success Stifler to level up your personal performance.

40-45
Review Key Notes & Next Steps
Make results, not excuses
• Let's take a few minutes to reflect on our discussions, confirm your GuideMap priorities and ensure you have clear next steps.



Take Practice Diagnostic Assessment

Schedule via Calendly with Coach Lauren

1:1 Roadmap Strategy Call with Coach Lauren

GuideMap, TrailGuide, 1-Page Business Plan



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.

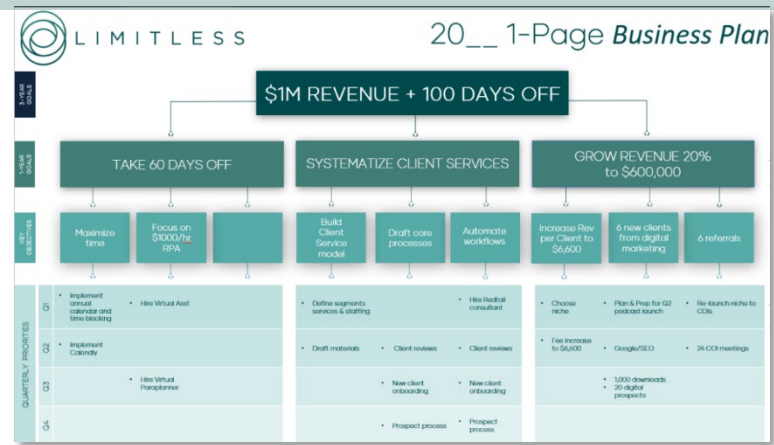
Qtr	LEARNING PATHS	TRAILHEAD LESSONS	Priority Level	Complete	N/A	ADVANCED LESSONS	Priority Level	Complete	N/A			
1	Mindset Mastery	The Science of Success	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Self-Talk for Success Relationship to Money Overcoming Overwhelm Creating 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"/>

2 Your Coaching Trail Guide keeps you on track along your Learning Path

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">

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 crush of relying upon stock plans by focusing instead on what matters most to clients. Refine 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?

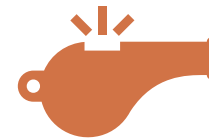
WHERE
TO
GO
FOR ...



GENERAL QUESTIONS



COACHING@LIMITLESSFA.LIFE



COACHING

VRITUAL AND
LEGACY

WEEKLY OFFICE HOURS

GOOD VIBES TRIBE

LIVE

1:1 COACHING PASS

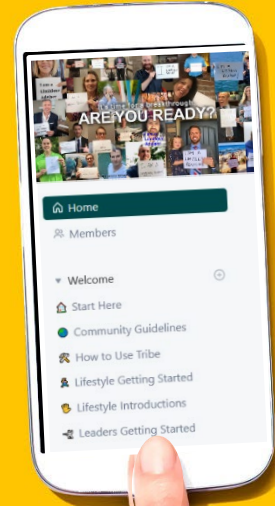


LESSONS/RESOURCES



members.LimitlessFA.life

GOOD VIBES TRIBE



Get ready to
get Limitless.

Allison Will Lead You on a Live
Site & Tribe Walkthrough!



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
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14	15	16	17	18	19	20	18	19	20	21	22	23	24	16	17	18	19	20	21	22	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	27	28	29	30	31			
28	29	30	31	25	26	27	28	29	30	30	31	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	1	2	3	4	5	6	7	5	6	7	8	9	10	11	3	4	5	6	7	8	9
10	11	12	13	14	15	16	8	9	10	11	12	13	14	12	13	14	15	16	17	18	10	11	12	13	14	15	16
17	18	19	20	21	22	23	15	16	17	18	19	20	21	19	20	21	22	23	24	25	17	18	19	20	21	22	23
24	25	26	27	28	29	30	22	23	24	25	26	27	28	26	27	28	29	30	24	25	26	27	28	29	30		
							29	30	31	29	30	31	29	30	31	31											

Success Shifts

- ELEVATE YOUR THINKING
- DESIGN YOUR MODEL PRACTICE
- TAKE CHARGE OF YOUR TIME
- BE CLIENTS' TRUSTED ADVISOR
- DESIGN & 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 Breakout Brand
- Mapping Your Marketing Plan
- Outliving COIs
- Client Reference
- 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 coming in Inbox Insights!

The screenshot shows the website for the 2023 Performance Playbook Virtual Retreat. At the top, there is a navigation bar with the Limitless logo, the word "LIMITLESS", and links for "Summary", "FAQ", and a "Register Now" button. Below the navigation bar is a large banner image of a mountain landscape. The banner text reads "2023 Performance Playbook Virtual Retreat" and "January 23, 2023 8:30 AM-3:30 PM PT". Below the banner is a paragraph of text describing the retreat: "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...". At the bottom of the page, there are four circular progress indicators with the numbers 22, 20, 36, and 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 Relationship to Money Overcoming Overwhelm Creating Change	<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"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<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"/>
		<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"/>		<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"/>
		<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"/>		<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 Story Telling as a Super Power	<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"/>
		<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"/>		<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"/>
School of Advice	One-Page Financial Plan Amazing First Meeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bridging the Behavior Gap Scary Markets Conscious Conversations Goals-Based Client Review Guide Your Defender	<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"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Crafting Your Client Service Model	Finding Your Fee Model Client Meeting Surges Finding Your Fee Model	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sizing Your Business Fine-Tuning Fees & Transitions Fine-Tuning Fees & Transitions Finding Client Clusters No Stress Sales Process	<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"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Securing and Scaling Your Value	Finding Your Fee Model Finding Your Fee Model	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Navigating Your Niche Fine-Tuning Your Fee Model Communicating Your Value Coach Panel	<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"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communicating Your Value	Finding Your Fee Model Finding Your Fee Model	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Communicating Your Value: Big Levers Unique Value Proposition Story Telling as a Super Power Marketing Your Niche Navigating Your Niche How to Shift Your Niche with Success	<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"/>
		<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"/>
		<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"/>		<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	6 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		New client onboarding	2K CCR meetings
Q3		New client onboarding	1000 downloads
Q4		Prospect process	20 digital prospects

Q & A





LIFESTYLE MASTERMIND TRAINING & MEET-UP

All 1st year Mastermind Members, stay in this room.

- 9:45 – 11:30 PT

LEADERS KICK-OFF & MASTERMIND MEET-UP

- 11:00 – 12:45 AM PT

PERFORMANCE RETREAT (virtual)

- JANUARY 23



Making the Most of Your MASTERMIND

TODAY'S AGENDA



WHY MASTERMINDS



WHAT REALLY MATTERS

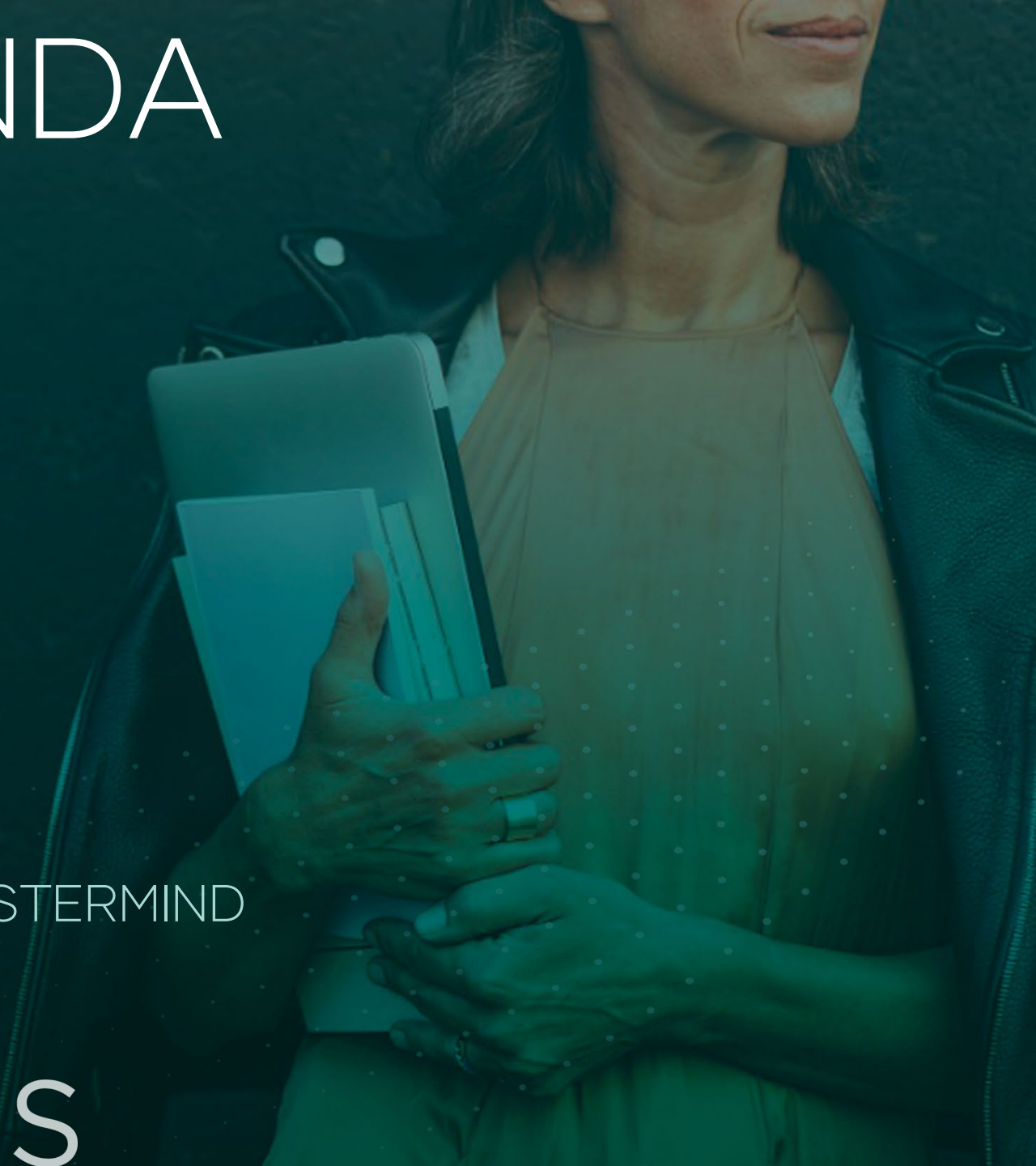


THE MASTERMIND MODEL



BREAKOUT: MEET YOUR MASTERMIND

LIMITLESS



WHY MASTERMINDS?

SOME OF THE MOST SUCCESSFUL PEOPLE IN HISTORY USE MASTERMIND GROUPS



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

BENEFITS OF A MASTERMIND



1

Clarifying Goals



2

Accountability



3

Perspective



4

Fresh Ideas



5

True Support

WHAT REALLY MATTERS

1 Attitude

2 Actions

3 Accountability

1 Trust

2 Care

3 Commitment



Mastermind Commitments



No Tech or Distractions for the Duration of Meetings

To ensure the meeting is your sole focus, you should be tech and distraction-free during meetings. Unless you're the scribe, no tech use (aside from Zoom). All technology is off and distractions set aside during meetings.



Full Confidentiality

Everything you talk about stays within the group (and with the Coaches). You're not even allowed to tell your spouse about what's going on where personal issues are discussed! Trust is the bedrock of a successful Mastermind, so be trustworthy with your attention and actions.



Be Ready to Rock-n-Roll

Everyone is taking time out of their days for meeting, so everyone deserves you to be on time and prepared. Doing so demonstrates that you're committed and respect other members' time as valuable.



Serious Attendance Policy

Given meetings are held monthly, everyone should commit to a strict attendance policy, or else the group is likely to suffer. Each member can miss one Mastermind without issue. On the second miss, members agree to go to the Penalty Box.



Rules Make a Difference

Creating and following a consistent structure is just as important to the success of your group as your level of engagement. Respecting and reinforcing ground rules is a key part of your commitment to the group. This doesn't mean being rigid, it does mean recognizing that a disciplined structure is the bedrock of a successful Mastermind.



Take Extreme Ownership

It's easy to sit back and let the group 'go with the flow,' but if you want to get the most out of it, be proactive about following the model, fixing things that aren't working, and taking personal responsibility for your Mastermind success.



Growing Better Together

Masterminds are all about gathering and growing, together. Each member invests in caring about other members' situation and success, contributing to each other success as well as your own. There is a very real and direct correlation between what you bring and give to your group and what you get out of it. This is a team sport.



Bring Your Very Best

Your attention and active engagement are paramount during meetings, as is open communication, candid yet constructive conversations, a willingness to challenge your peers, and your willingness to be open and authentic.



Commitments Count

These commitments count, with each playing an important role in creating and sustaining a high-impact Mastermind. When a member fails to meet a commitment, it's everyone's responsibility to enforce consequences to reinforce importance and learning. When a member breaks a commitment, he/she will have commitment consequences to be paid. Here is a suggestion but define with your group:

- 1st offense – pick small consequences to reinforce importance
- 2nd offense – make this one sting a little (e.g., \$50 to each member's favorite charity)
- 3rd offense – make this one sting a lot (and be ready to enforce it); let us know!

Our Consequences:

- 1st offense –
- 2nd offense –
- 3rd offense –



Each member of this Mastermind Group hereby commits to following the Mastermind Commitments for the next 12 months.

Sign Name Here

Sign Name Here

Sign Name Here

Sign Name Here

Sign Name Here

Sign Name Here



LIMITLESS

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The Mastermind COMMITMENTS

MASTERMIND MODEL

1X MONTH MASTERMIND CALL TO MAINTAIN MOMENTUM



ROLL CALL & AGENDA REVIEW



STATUS CHECKS



HOT SEATS & ROUNDTABLES



ACCOUNTABILITY COMMITMENTS



FRIDAY CHECK IN

MONTHLY MEETING AGENDA

- Take attendance
- Designate meeting roles
- Review Agenda & Rules
- Identify Hot Seats
- Select Roundtable (optional)
- *Length: 30m/member*
- *5 minutes*

- Each member shares update
- Significant accomplishments
- Accountability update
- Pressing issues/challenges
- Follow Gestalt process (inquiry)
- *60 mins (10-15min/member)*

- Run Hot Seat(s)
- Dive into member issues
- Follow Hot Seat Process
- *30 mins/member*
- Run Roundtable(optional)
- Member shares on selected topics
- Time as designated

- Each member clarifies commitments, sets accountability consequence
- Confirm next meeting
- Post meeting notes
- *3 mins/member*
- *15-minutes*

FRIDAY CHECK INS

- Weekly MM Review
- Email to group or post to MM Tribe

ROLES & RESPONSIBILITIES



EVERYONE

- Be 1 minute early
- Come prepared!
- Start on time (no matter what)
- No devices or distractions
- Commit to your group and time
- Go "all in" supporting your peers
- Capture notes and commitments



LEADER

- Clarify roles for meeting (leader, scribe, timer)
- Set order for discussions
- Identify Hot Seats & Roundtables
- Help move conversations forward
- Re-direct when off topic
- Ensure Accountability Commitments made



SCRIBE

- Fill out Mastermind Group Sheet
- Post to Mastermind Room
- *@mention* Coaches (as needed)



TIMER

- Track time for each agenda section; keep on track
- Use agreed-upon method to interrupt when necessary

MASTERMIND GROUP CALENDAR

Shared responsibility. Shared success.



	JAN 9	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
POD LEADER	Member 1	Member 4	Member 2	Member 5	Member 3	Member 1	Member 4	Member 2	Member 5	Member 3	Member 1	Member 4
NOTE TAKER	Member 2	Member 5	Member 3	Member 1	Member 4	Member 2	Member 5	Member 3	Member 1	Member 4	Member 2	Member 5
TIMER	Member 3	Member 1	Member 4	Member 2	Member 5	Member 3	Member 1	Member 4	Member 2	Member 5	Member 3	Member 1
DISCUSSION ORDER	<ul style="list-style-type: none"> Leader opens call Identifies discussion order Note taker confirms ready Time confirms time per member, sets first timer Follow Mastermind Meeting Call Agenda 											
CALLS & MEETUPS	<ul style="list-style-type: none"> CALLS 2ND MONDAY OF MONTH, 9:00 – 11:30 PT (30 minutes per member) MASTERMIND MEET UP DAYS: March 9 and August 24 (Virtual & In-Person Meetings) Mastermind Check Ins: Coach Check-Ins will rotate monthly (your group will be notified of check-in dates) 											

MAXING OUT YOUR MASTERMIND

PRE-CALL PREP: 5-MINUTES TO MAKE THE MOST OF YOUR MEETING TIME

- Shift into Mastermind mode
- Use Mastermind Meeting Agenda to get clear and intentional
- If Hot Seat issue, be sure to:
 - succinctly frame the issue
 - give context
 - make a clear ask
- Check Monthly Mastermind Calendar for your role
 - Leader, Notetaker, Timer or N/A this call

FRIDAY CHECK INS: 5-MINUTES TO MAINTAIN YOUR MOMENTUM

- Each Friday (before you leave for day):
 - Answer questions on Mastermind Friday Check In Template
 - Send email to your Mastermind members

LIMITLESS ADVISOR COACHING
MASTERMIND MEETING AGENDA
Use this sheet as the Agenda template to take notes and track progress for Mastermind Meetings

ROLL CALL AND AGENDA REVIEW
(8 minutes)

Leader to open, take attendance, confirm today's roles (see Mastermind Group Roles Calendar)

PARTICIPANTS:	ON TIME? Y/N	ROLE? (Facilitator, Time Keeper, Hot Seat, etc)
1. Insert here		
2. Insert here		
3. Insert here		
4. Insert here		
5. Insert here		

Review Meeting Agenda & Rules
Identify Hot Seats
Select Roundtable Topic (optional)

TODAY'S HOT SEAT(S)	ROUNDTABLE TOPIC (Optional)	Notes:
1. Insert here	Input Hot Seat Topic: Insert here	
2. Insert here	Input Hot Seat Topic: Insert here	

ONE WORD FOR THE WEEK
(2 minutes)
Share the one word that best describes how you're feeling. Rotate through members in 2 minutes.
Do not spend time discussing why, that will come up in status check.

STATUS CHECK
(10 minutes person / 50 minutes total)
Spend 10 minutes per person to provide status check on progress since last meeting and status check on commitments.
Use Member section below to review progress and capture notes and commitments.

I. Name	Insert Member Name	FEELING FOR WEEK: Insert one-word description
Review Accountability Commitments from prior week	COMPLETE	Y / N Notes

During Status Check, review priorities, progress and status of commitments.

TOP Priority: Insert here
NEXT STEP: Insert here

OTHER: Insert here
NEXT STEP: Insert here

Commitments for:
Coming Week: 1
Accountability Partner: Insert Accountability Partner here

NOTES:

Mastermind Group
FRIDAY CHECK-IN EMAIL TEMPLATE
Use this sample check-in email as a starting point for crafting your own, using the template that follows.

CHECK-IN EMAIL TEMPLATE SAMPLE:

Hi Mountain Climbers, here's my Friday check in...

Significant Accomplishments this week:

- Hired Paraplanner
- Re-working client segmentation plan (as first step to updating Client Service Model)
- Finished IRA RMD's

What makes it significant?

- Paraplanner Ivanrago will free up much needed team time
- Continued updates to the system to make it easier to update and check where clients rank.
- Getting tasks done earlier this year, work on systems is starting to show

Asks:

- Stay on me to have my staff reviews before year end

Limitless Support Requests (cc: Coaching@LimitlessFAIre)

- 1.

Talk Monday,
Joo

LIMITLESS



THE STATUS CHECK

EACH MEMBER CHECKS-IN (THIS IS NOT HOT SEAT!)



*Watch Gabe Nelson's
HOT SEAT
example in Tribe!*



SHARE

Summarize last Friday check-in Status on Accountability Actions Wins and/or Challenges

3 minutes



CLARIFY

Ask questions to help everyone understand the issue; restate the issue in the form of question

5 minutes



DISCUSS & DECIDE

Identify 1 action you can take in the next week and/or 2-3 actions you can take in the next 90 days.

5 minutes



STAY ACCOUNTABLE

Identify 1 action you can take in the next week and/or 2-3 actions you can take in next 30 days.

2 minutes

GREAT CALLS KEEP MOVING FORWARD

Keep conversations focused and moving forward.

"You shared a few different things there, let's note those and stay focused on ..."

SET TIME BLOCKS

"We've got 10 minutes left and still need to hear from Ali and Bob. Go ahead Ali."

"We're going to talk about this for about 20 minutes. Let's check in at 15 minutes."

INQUIRY APPROACH

The goal is to expand thinking, create understanding and provide options to consider, not to provide direct guidance.

"I heard you say that you are struggling with staff, but you also talked about your time and processes along the way, which of these is having the biggest negative impact right now?"
(helps create focus)

"Have you considered talking to outside partners to help you with this problem?"
(provides options without directing)



BE A LEADER

"We're all going to pose a question so let's go in this order: Ali, Bob, Jules, Ruben, Rosa."

INTERRUPT, AND...

That's a really important point, and I'll note that We've got 10 minutes left and still need to get to your asks.

MANAGE TIME

"We've got 10 minutes left and still need to hear from Ali and Bob. Let's take 1 minute to wrap and move to Bob."

"That's a great share Bob, in the interest of time, let's take 10 minutes to talk that through."

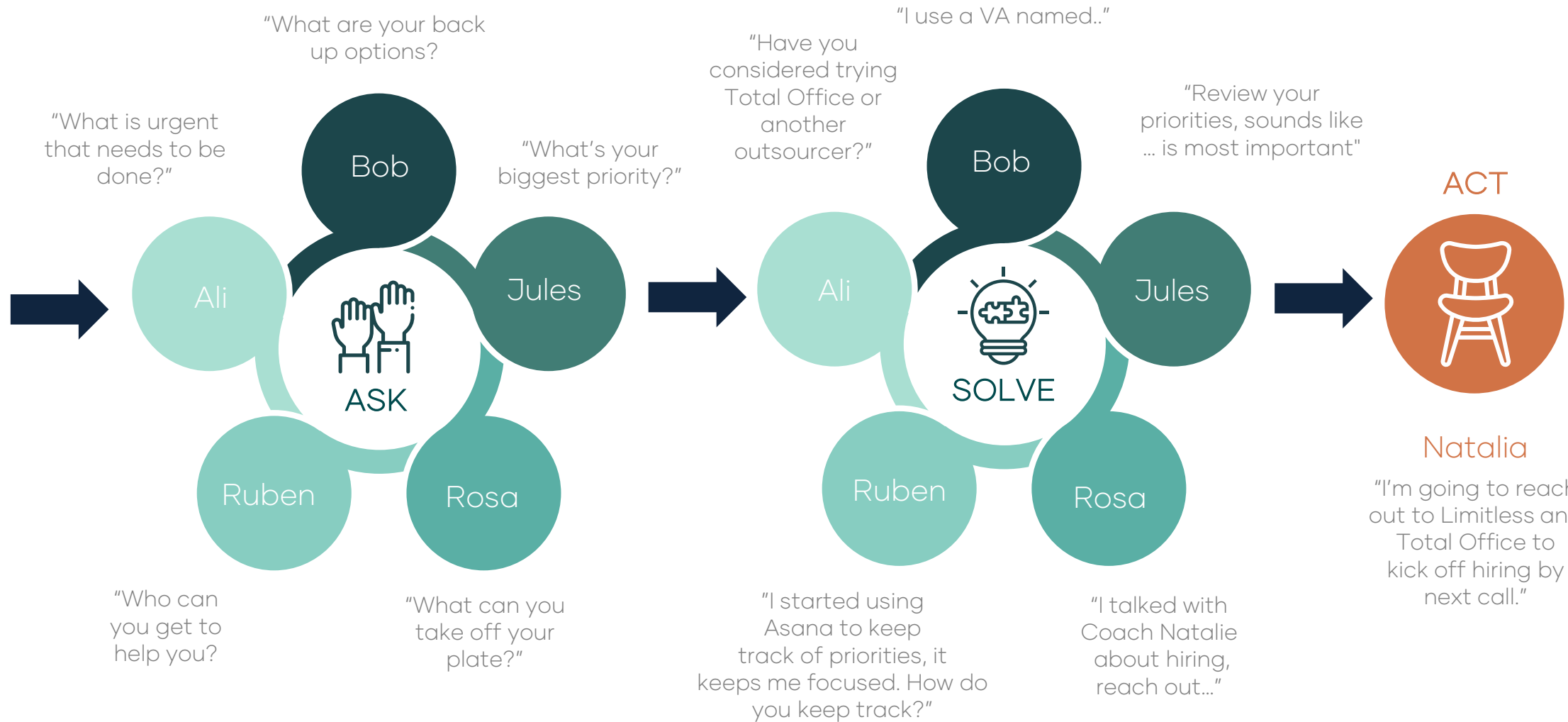
- o BE 1 MINUTE EARLY
- o COME PREPARED!
- o START ON TIME (NO MATTER WHAT)
- o NO DEVICES OR DISTRACTIONS
- o COMMIT TO YOUR GROUP AND TIME
- o GO "ALL IN" SUPPORTING YOUR PEERS
- o CAPTURE NOTES AND COMMITMENTS

THE HOT SEAT PROCESS



SHARE

Natalia
"My assistant just left, I'm behind on priorities"



Mastermind Meeting Agenda

1X MONTHLY MASTERMIND CALL TO MAINTAIN MOMENTUM



ROLL CALL & AGENDA REVIEW

Call Leader

8 Minutes

- Take attendance
- Confirm meeting roles
- Review Agenda & Rules
- Identify Hot Seats
- Select Roundtable topic (optional)



STATUS CHECK

- Each member shares update
- Significant accomplishments
- Accountability updates
- Pressing issues/challenges



HOT SEAT & ROUND TABLES

- Run Hot Seat(s)
- Dive into member issues
- Follow Hot Seat process
- Run Roundtable (optional)
- Members share on selected topic



ACCOUNTABILITY COMMITMENTS

- Each member clarifies commitments
- Set accountability consequence
- Confirm next meeting
- Post meeting notes



WRAP-UP & WEEKLY UPDATES

My Mastermind Goals: Member Name

MY SUCCESS METRICS	January	February	March	April	May	June	July	August	September	October	November	December	YTD Totals
Revenue													0
AUM													0
Avg. Revenue / Client													0
# of Ideal Clients													0
# Work Hrs / Week													0
# Days OOO													0
Other1													0
Other2													0

MY BUSINESS GOALS	January	February	March	April	May	June	July	August	September	October	November	December
Input Business Goals												

MY PERSONAL GOALS	January	February	March	April	May	June	July	August	September	October	November	December
Input Personal Goals												

LIMITLESS ADVISOR COACHING			
MASTERMIND MEETING AGENDA			
Use this sheet as the Agenda template to take notes and track progress for Mastermind Meetings.			
ROLL CALL AND AGENDA REVIEW (8 minutes)			
• Leader to open, take attendance, confirm today's roles (see Mastermind Group Roles Calendar)			
PARTICIPANTS:	ON TIME? Y/N	ROLE? (Facilitator, Time Keeper, Hot Seat, etc)	
1 Insert here			
2 Insert here			
3 Insert here			
4 Insert here			
5 Insert here			
• Review Meeting Agenda & Rules			
• Identify Hot Seat/s			
• Select Roundtable Topic (optional)			
TODAYS HOT SEAT(S)	ROUNDTABLE TOPIC (Optional)	Notes:	
1 Insert here	Input Hot Seat Topic	Insert here	
2 Insert here	Input Hot Seat Topic	Insert here	

MASTERMIND AGENDA & RESOURCES



DISCIPLINED APPROACH



MANAGING TIME



ACCOUNTABILITY ACTIONS

Check out your Mastermind Group Google Sheet & Goal Tracker



HOW DID YOU DECIDE MY GROUP



WHAT WE KNOW ABOUT YOU

- Enrollment Application
- Personal profile
- Getting to Know You
- Mastermind Group Survey
- Special requests



SYNERGY NOT SAMENESS

- Shared common ground
- Diversity of perspectives
- Committed to the group



ACCOUNTABILITY
ACTION
CONSEQUENCES
*(think uncomfortable,
not humiliating)*



- Do a video dance and post to the group
- Sing a song in front of the group
- Send \$50 to every members favorite cause/charity
- Send \$50 to every members least favorite cause/charity
- Wear sport team you hate for a day



HELPFUL HINTS

WHEN IT'S YOUR TURN:

Be prepared and clear
on your ask

Be open and frank

Avoid being defensive
or reactive

Actively take
your own notes

EVERYONE ELSE:

Be prepared

Be open and frank

Be gracious and non-
judgmental

Actively take your own notes

Don't hog the conversation

Ask open-ended questions

L I M I T L E S S

TAKE ADVANTAGE OF THE TOOLBOX



TRAINING & TOOLS

- Recording of this Training Session
- Mastermind Guidebook
- Mastermind Process and Agenda

COACH CHECK INS

- Twice a year a Coach will rotate through Mastermind Groups to check in on group status, dynamics, progress and offer coaching advice and guidance for members and to maximize group.
- As you complete coaching check ins, keep us posted
- If your Group needs help managing the group dynamics, creating momentum or other guidance, just let us know and we'll be there to help.



TOOLS YOU CAN USE



TOOLS YOU CAN USE

- Tribe Community (Circle Platform) for posting/sharing
- Google Sheet doc for Weekly Reviews
- Dropbox for a central folder to share and store



GEAR UP TO BE READY

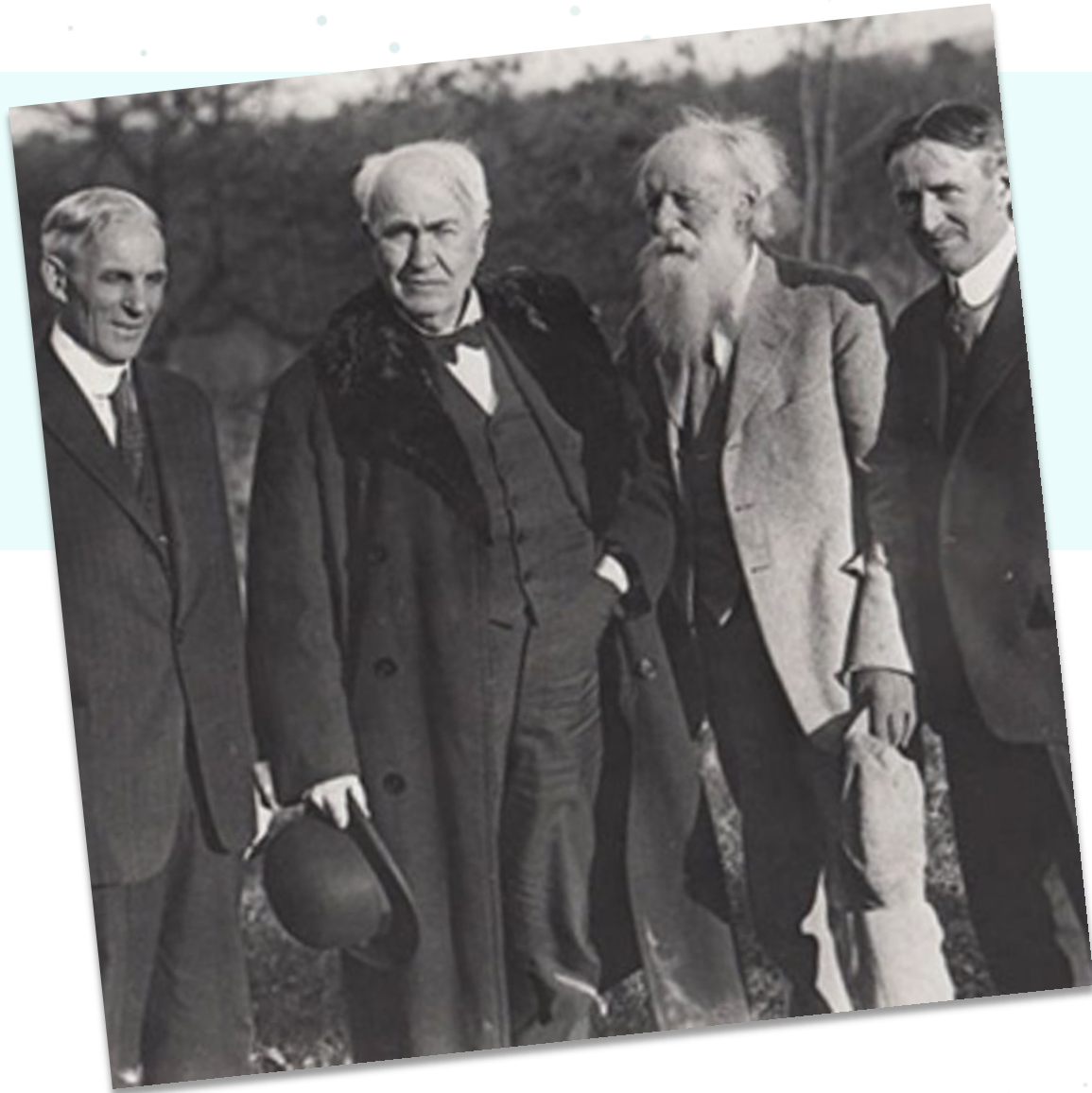
- Take extra time to be ready for your calls
- Have your video turned on, know how to use it
- Have good lighting so everyone can see you
- Be close enough to see your own expressions
- Avoid back-lighting

COMMUNICATION PLATFORM:
[ZOOM.US](https://zoom.us)

CAMERA:
[Logitech Camera](#)
(Logitech C920 / C922 / C930)
[Logitech software support Tutorial](#)

PROFESSIONAL MICROPHONE
FOR VIDEO CONFERENCING:
[Blue Yeti USB Microphone](#)





THE VAGABONDS

*Henry Ford, Thomas Edison, Harvey
Firestone, and John Burroughs*

"The coordination of knowledge and effort of two or more people, who work toward a definite purpose, in the spirit of harmony."

NAPOLEON HILL- THINK AND GROW RICH

MASTERMIND MEET & GREET

LIFESTYLE & LEGACY

10:30-11:30 AM PT

LEADERS

11:00 LEADERS KICK-OFF

11:45 LEADERS MM MEET



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. (Reset your call for Jan due to the holiday).
- 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

