

LIMITLESS Coaching Call Transcript

December 4th, 2023
Lifestyle Practice Development Call
12.04 Lifestyle Coaching Call (EOY Wrap)

60

00:08:08.150 --> 00:08:13.310

Adam Cmejla, CFP®: We are excited to get started. Hey, Adam, how are you?

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00:08:14.000 --> 00:08:30.520

Adam Cmejla, CFP®: I see you. You are much more festive than I am. I had gotten dressed this morning and realize, oh, wait, no, we have the practice our last call of the year, and I went to my. I went to my wife, and I said, Do we do we have a Santa hat or something, and she's like, Go look in the donation bin in the back of my car, and there was nothing back there. So

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00:08:30.520 --> 00:08:49.059

Adam Cmejla, CFP®: I grab the buffalo check that I had in. This is as close to Christmas sweaters or Christmas theme colors as I have. So you are a a more festive person, as I see Samantha's, and maybe a couple of others here that I need to bring on so well played, thank you all or oh, yeah. Well played so

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00:08:49.080 --> 00:08:50.250

Allison Foulk: happy. Monday.

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00:08:51.810 --> 00:08:56.049

Allison Foulk: I know I like. Samantha's a lot good looking one.

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00:08:56.210 --> 00:09:00.109

Hi! Everyone welcome to our call today

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00:09:00.250 --> 00:09:06.189

Allison Foulk: we are excited to have you guys here today on our final coaching call of the year. Believe it or not.

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00:09:06.440 --> 00:09:28.059

Allison Foulk: We have a few office hours which I'll talk about in a second. But today I have Adam with me, and then also several folks who are going to be sharing their journey throughout the year. And so their big wins, how they implemented successful practices for limitless into their life and into their practices.

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00:09:28.060 --> 00:09:51.450

Allison Foulk: So the first thing I wanna do is I want to excuse Stephanie. Her dad is having some pretty severe heart issues, and he fell this past week and I don't know if he broke his elbow, but he's going



through a lot, and she's trying to support him so she will be sending out a video with her final farewell of the year. But she will not be joining today.

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00:09:51.960 --> 00:10:03.250

Allison Foulk: So I wanted to kick off and go over what we have upcoming, which is, we have our last mindset office hours of the year with coach lid today.

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00:10:03.270 --> 00:10:29.399

Allison Foulk: So we are super excited to give you one more opportunity to go hang out with her. If you are interested in joining Coach Adams cohort for next year, and you have any questions on that feel free to join us next Monday at 9 Am. Pacific time. He will have a 30 min little QA. Session where you can come. See if the cohort feels like a good fit to you, and he will be super happy to answer any of your questions.

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00:10:29.430 --> 00:10:56.810

Allison Foulk: We also have our last practice office hours and mastermind next week, and then, if you want to refer anyone to limitless and get your \$1,000 referral credit for next year, just be sure to do so by the fifteenth, so we can make sure that's applied to your billing. Another thing. Another housekeeping item is, we have our end of Year Survey, which we will launch on this call, and we have some pretty cool prizes. Hi, Adam.

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00:10:56.840 --> 00:11:21.579

Allison Foulk: One of them is participation in his cohort. If you are a member next year. So go ahead and take the survey. Katherine or Leona is going to drop the link in the chat here and you can go ahead and take it by clicking the link. If you want to do on your computer

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00:11:21.580 --> 00:11:33.059

Allison Foulk: or click the QR code here, if you don't mind doing it on your phone. You can win either Coach Adam Cohort or a live retreat workshop some pretty cool prizes, and we get to hear from you which we love.

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00:11:33.160 --> 00:11:34.790

So, Adam.

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00:11:35.120 --> 00:11:38.240

Allison Foulk: have you heard any good jokes lately?

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00:11:38.280 --> 00:11:52.970

Adam Cmejla, CFP®: Do you want to go first, or do you want me to go first, because I'm trying to. I have to pull up my list because I did take notes from last year's because there were a couple of good ones last year that I'm that I'm pulling up here, so if you have one ready to go, I will refer to you.

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00:11:53.000 --> 00:12:11.690

Allison Foulk: I don't have one ready to go. I was hoping you're gonna swing. Okay, so let's let's start off. Do any members have a good Christmas joke to start us off before we dive into some of our successful members for the year.



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00:12:12.880 --> 00:12:14.329

There may be prizes

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00:12:14.530 --> 00:12:19.679

Adam Cmejla, CFP®: I do have, so I'll start out as if invited. So why does Scrooge love rude off the red nose reindeer

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00:12:20.920 --> 00:12:23.450

Adam Cmejla, CFP®: because every buck is dear to him.

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00:12:26.020 --> 00:12:42.909

Adam Cmejla, CFP®: What did Adam say on the day before Christmas?

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00:12:43.590 --> 00:12:45.559

Allison Foulk: It's Christmas Eve?

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00:12:46.720 --> 00:12:48.669

Allison Foulk: Oh, yes.

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00:12:49.120 --> 00:12:52.050

Adam Cmejla, CFP®: terrible.

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00:12:52.540 --> 00:13:05.360

Allison Foulk: They're supposed to be bad, Corny. Christmas jokes right? If we want to get raunchy like, we can just put bad. Santa like that was that was

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00:13:05.400 --> 00:13:10.949

Adam Cmejla, CFP®: like that that that movie forever. Change my opinion on Christmas. Let's just say that.

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00:13:11.060 --> 00:13:16.599

Allison Foulk: Oh, no, I'm glad I haven't seen that. Then Dad jokes for the win, Ethan, do you know where I keep all my dad jokes

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00:13:18.360 --> 00:13:20.100

Adam Cmejla, CFP®: in the database?

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00:13:23.360 --> 00:13:24.939

Adam Cmejla, CFP®: Put him right?

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00:13:25.030 --> 00:13:39.039



Allison Foulk: Okay.

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00:13:39.550 --> 00:13:46.750

Adam Cmejla, CFP®: Intend on doing

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00:13:46.940 --> 00:14:02.040

Allison Foulk: well. Thanks for being willing to hold the torch of the dad jokes. Okay. So if anybody else has any, you're free to look for dad jokes during our success shares. And if you find any good with that, dad jokes

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00:14:02.110 --> 00:14:05.639

Allison Foulk: Christmas jokes, yeah, which probably do.

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00:14:05.990 --> 00:14:11.940

Adam Cmejla, CFP®: They they do double as dead jokes, right? Because they're both pretty bad.

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00:14:12.240 --> 00:14:27.430

Allison Foulk: Okay, so we are. Gonna turn over time kicking off to Darren. Darren is a member who has attended every book club this year. Is that right?

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00:14:27.450 --> 00:14:29.049

Daren Chamblee: I think everyone but one.

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00:14:29.230 --> 00:14:30.620

Allison Foulk: everyone but one.

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00:14:31.630 --> 00:14:51.679

Allison Foulk: And you can see the list of the books he's read here. I think I see. Oh, I see some Cs blue as well, too. That's awesome. So he's read all the books, and I'll let him kind of share his process, and why he decided this was important for him and some of his takeaways. So, darren.

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00:14:52.050 --> 00:15:04.769

Daren Chamblee: thanks, Alison. Well, it feels kind of like April may be April fools when when I see most well read award. But thank you. Thank you very much. Nonetheless.

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00:15:04.850 --> 00:15:08.690

Daren Chamblee: One of the things that I find is been just

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00:15:10.010 --> 00:15:13.689

Daren Chamblee: part of the journey, and it's spectacular that I think a lot of people missed

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00:15:13.720 --> 00:15:18.760

Daren Chamblee: was the reading portion, and if you're coming back next year.



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00:15:18.770 --> 00:15:29.910

Daren Chamblee: It takes about 10 min a day to read all the way through the books. and I'll just highlight a couple that meant a lot to me. The first one was atomic habits.

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00:15:30.000 --> 00:15:32.870

Daren Chamblee: probably the most powerful book of

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00:15:33.240 --> 00:15:34.849

Daren Chamblee: all that was on the list.

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00:15:34.940 --> 00:15:37.499

Daren Chamblee: If you haven't read it, it's worth reading.

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00:15:37.510 --> 00:15:41.559

Daren Chamblee: Because I think if you don't have good habits, you don't have good success.

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00:15:41.710 --> 00:15:56.910

Daren Chamblee: and the we, in a way, rise to the success of our habits. and one of the biggest things that I took from it was time blocking. I used to think that I had a time Block and Adam and I talked about time blocking. I found out.

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00:15:56.990 --> 00:16:08.010

Daren Chamblee: you know. I always thought well, I got a time block, but you know it never really meant that much to me. But then, as I was talking to him. it was just a small tweak, an I'm going to call it a hare.

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00:16:08.090 --> 00:16:15.419

Daren Chamblee: In that his time Block had what he was doing in the time. Block my time block had a general

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00:16:15.740 --> 00:16:19.309

Daren Chamblee: making phone calls. you know. So well.

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00:16:19.680 --> 00:16:34.130

Daren Chamblee: if making phone calls was there, if I didn't have, you know. It gave me the opportunity to loaf when I had making phone calls to this client, this person and this person. Then I had a specific direction to go on.

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00:16:34.230 --> 00:16:39.819

Daren Chamblee: and I don't know about you, but I don't really enjoy sticking to

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00:16:40.080 --> 00:16:47.330

Daren Chamblee: a strict schedule, but I've learned that as I've gotten into it. It's very rewarding.



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00:16:47.360 --> 00:16:52.770

Daren Chamblee: So that's probably the number one book that I read all year long.

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00:16:52.910 --> 00:17:00.080

Daren Chamblee: The second thing that I learned from reading is the one page marketing plan. I've

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00:17:00.140 --> 00:17:12.189

Daren Chamblee: I'm the king of tactics, and I learned strategy was more important than tactics. Throwing things up against the wall, as I said, and I listened when in August and we talked about

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00:17:12.260 --> 00:17:16.989

Daren Chamblee: videos, we talked about podcasts. And you know what I've had every one of those.

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00:17:17.079 --> 00:17:24.809

Daren Chamblee: but none of them work, because I never had a strategy of how it was gonna work. I had a tactic of just I heard about it. So I went and tried it. So

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00:17:24.890 --> 00:17:31.540

Daren Chamblee: those are the 2 biggest takeaways that I had. From the year was

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00:17:31.950 --> 00:17:34.770

Daren Chamblee: the habits and the strategies.

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00:17:34.790 --> 00:17:37.330

Daren Chamblee: The third book that I read.

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00:17:37.410 --> 00:17:41.919

Daren Chamblee: Was the book about that Adam just happened to mention

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00:17:42.040 --> 00:17:55.209

Daren Chamblee: about running your business, and it doesn't come to mind the name of it right now. But how to actually set up and understand pre-tax profit margin. And I built my spreadsheet.

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00:17:55.230 --> 00:18:03.440

Daren Chamblee: Was, it was probably their profit. First, the one the toilet paper business plan or pumpkin plan.

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00:18:03.500 --> 00:18:12.660

Daren Chamblee: Yup, the one page. What is the profit? It's a orange book. Profit, pumpkin plan? Yep, yep, it's a beautiful book.

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00:18:12.770 --> 00:18:23.709

Daren Chamblee: Because my strategy until this point had been. hey, I'm going to pay myself the least amount that I can. At the end of the year. I'm going to go buy something and have a write off.

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00:18:23.860 --> 00:18:41.919

Daren Chamblee: And it really doesn't work for going to business. And I think, as I learned that. And when I brought that to my Cpa, you know the look on his face said it all actually. And and he said, How did you figure this out.

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00:18:42.340 --> 00:18:47.010

Daren Chamblee: and he said, I've been trying to tell you this for about 5 years.

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00:18:47.290 --> 00:18:58.710

Daren Chamblee: and and I, as I look back, he was, you know, he was really in a round about way, but he couldn't say it in the direct way that the book did, because I'd probably went somewhere else.

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00:18:58.770 --> 00:19:10.229

Daren Chamblee: So, but it. It was a great book, so I learned something about my business. I learned something about habits, and I learned something about strategies, and those were the 3

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00:19:10.420 --> 00:19:18.489

Daren Chamblee: key takeaways from it. And I would add, the fourth thing. That I learned this year more important than anything is

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00:19:18.770 --> 00:19:22.719

Daren Chamblee: knowing something doesn't change anything.

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00:19:22.820 --> 00:19:24.650

Daren Chamblee: doing something dust.

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00:19:24.890 --> 00:19:28.639

Daren Chamblee: And the fact that we've been here and we learned a lot of stuff.

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00:19:28.770 --> 00:19:37.840

Daren Chamblee: the ability to move it from this big fire hose down to the kitchen faucet turned wide open, has been the key to the year for me.

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00:19:40.880 --> 00:20:04.549

Adam Cmejla, CFP®: That's awesome dude. I'm I'm like that. That's just really really cool to hear how much of an impact that's had on you. I I remember it was within the first couple of years of being in business, and I don't remember where I heard this, but I'll never forget the quote which was by Charlie Tremendous. Jones was his nickname. He was originally started off as an insurance agent, I believe in like the late

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00:20:05.520 --> 00:20:18.390

Adam Cmejla, CFP®: maybe it's the early 19 hundreds, 1930, something like that more so on the life insurance side of thing. I'm obviously on the life insurance side of things, but then turned into I mean he crushed it and turned into a sales consultant, and

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00:20:18.680 --> 00:20:30.730

Adam Cmejla, CFP®: his one of his phrases that I heard, or the only phrase of his that I've ever heard, that really resonated it stuck with me is, you will be the same person you are 10 years from now, as you are today, minus the people you meet in the books you read.

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00:20:31.190 --> 00:20:46.580

Adam Cmejla, CFP®: and that always, just really, really struck me right. And when you take that phrase combined with the and I don't know who to attribute this to, but like essentially you are the summation of the what 5 people you surround yourself with, or something like that, like.

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00:20:47.070 --> 00:20:51.770

Adam Cmejla, CFP®: if you want to aspire to a level that that is higher than where you're at.

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00:20:51.920 --> 00:20:56.730

Adam Cmejla, CFP®: Right. What was I forget again? Who else said if you were broke.

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00:20:56.820 --> 00:20:59.919

Adam Cmejla, CFP®: if if you found yourself broke today? But it was something that was like.

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00:21:00.030 --> 00:21:08.499

Adam Cmejla, CFP®: You know, Deca 1 million or something like that, you know. If you find yourself broke tomorrow, what would you do? Is like I'd borrow a million dollars and go hang out with with millionaires

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00:21:08.670 --> 00:21:14.610

Adam Cmejla, CFP®: like. If you want to do that, you need to surround. If you want to aspire to a level that's that's

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00:21:14.730 --> 00:21:17.150

Adam Cmejla, CFP®: different than where you are right now. Well.

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00:21:17.200 --> 00:21:29.130

Adam Cmejla, CFP®: surround yourself with people that are at that level. And to Darren's point you have to read, you have to consume knowledge and information that is, from other people, from other subject matter. Experts.

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00:21:29.370 --> 00:21:32.040

Adam Cmejla, CFP®: Darren, I'm curious. From a reading standpoint.

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00:21:32.210 --> 00:21:39.560

Adam Cmejla, CFP®: I love what you said when you, when you kind of distill it down, some people can think, oh, I can't read like traction. Right? Traction's a big book, big as in.

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00:21:39.950 --> 00:21:43.119

Adam Cmejla, CFP®: It's yeah an inch thick.

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00:21:43.440 --> 00:22:00.159

Adam Cmejla, CFP®: and and there's a lot of actionable parts in traction, so it can seem overwhelming. But your point 10 min a day, and you can get through all these books, did you? And and I'm curious to know th the true, honest answer did you read in intu in the entirety every single one of these books.

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00:22:00.370 --> 00:22:07.539

Daren Chamblee: There were one. There was one book, the I think it was the cell I forget which book it was. No, it was

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00:22:08.470 --> 00:22:16.459

Daren Chamblee: one about teamwork that I just got bored on and didn't read all the way through it, and so I tossed it out. I'm I'm generally.

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00:22:16.860 --> 00:22:20.819

Daren Chamblee: If if as soon as I start reading.

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00:22:21.130 --> 00:22:23.150

Daren Chamblee: if I don't like it, I don't continue.

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00:22:23.420 --> 00:22:32.729

Daren Chamblee: I used to kind of force my way through it. But there was a book. There's a spectacular book. If you're not a reader, it's actually in that list. I read it. How to read a book.

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00:22:32.910 --> 00:22:38.379

Daren Chamblee: It's probably the the number one book that you should read. I got that from Jim Rome.

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00:22:38.410 --> 00:22:44.090

Daren Chamblee: Listen. Listening to Jim Ron, and I thought how to read a book. What a stupid idea! But

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00:22:44.480 --> 00:23:02.999

Daren Chamblee: I went and got it, and I'm like, Oh, my gosh! This is spectacular! And he really talks about. You know where he says it's okay. Not every book is meant to read all the way through. Some books are for scanning some folks. Some books are for deep study, and quite frankly, some books are to just set down and say, It's not for me.

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00:23:03.060 --> 00:23:06.540

Daren Chamblee: but he teaches you, hey, how to quickly determine.

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00:23:06.690 --> 00:23:17.780

Daren Chamblee: does it make sense? And and so that was good. And in addition to these books also, I've I read the Bible from cover to cover this year. That's my most proudest

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00:23:17.930 --> 00:23:18.630

Daren Chamblee: like.

163

00:23:19.260 --> 00:23:21.700

Daren Chamblee: Good for you, laptop.

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00:23:22.070 --> 00:23:23.890

Daren Chamblee: and finally got it done.

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00:23:23.960 --> 00:23:44.899

Adam Cmejla, CFP®: Good for you. Good for you, Darren. Good for you, can. Can we just acknowledge the irony here that the how to read a book is the biggest book or the thickest book in the stack there? You think that would be a like a a blog post of how to read a book? But no, I remember looking at that book in on the on the I mean ibooks. It's like.

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00:23:45.000 --> 00:23:58.499

Adam Cmejla, CFP®: What is it, Darren? 350 or 400 pages long. How the hell can you write a book about how to read a book that's 400 pages long like that. Just I did not understand or grasp the concept there. But to your point. It's

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00:23:59.620 --> 00:24:05.489

Daren Chamblee: the reading list. The reading list that you get in the back is worth

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00:24:05.540 --> 00:24:10.160

Daren Chamblee: worth getting the book, if you never read it. of what you should read.

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00:24:10.790 --> 00:24:20.019

Adam Cmejla, CFP®: Well, you emphasize, you emphasize what I was hoping you were going to say, and it was something that I had to change about. My own approach to reading is.

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00:24:21.210 --> 00:24:25.240

Adam Cmejla, CFP®: I've always been a finisher, right? I always struggled with

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00:24:25.400 --> 00:24:48.919

Adam Cmejla, CFP®: never quit something that you start right. Just if I if I started this. I gotta push through. I gotta read every page, and I'll tell you. And the again the irony to the irony. I haven't read all of how to read a book I've skimmed through it. I look at the table of contents because that's part of what



I believe that book teaches you to do is to like, how do you start dissecting a book that you pick up to determine

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00:24:48.920 --> 00:25:03.280

Adam Cmejla, CFP®: how you're gonna read it? I do that with all books. Now I'll start at the table of contents and just look to see whether that's gonna be something that I'm going to be interested in it. And if I do start a book, Darren, to your point, and I get through it. And it's just like this, just isn't doing it for me.

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00:25:03.300 --> 00:25:23.640

Adam Cmejla, CFP®: Okay, put it down, get rid of it. Don't feel obligated to finish everything in that book, or if you find that you're that, you started to read the whole book. But then you're just like struggling. Go back to the table of contents and say, what was it about these about the table of contents that really resonated with me go to that chapter. Pick out whatever little nuggets that you can, and

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00:25:24.010 --> 00:25:36.840

Adam Cmejla, CFP®: and and move on. That's what to your point, I think, is what has allowed you to read these books. It's what allows me, and continues to keep me motivated to read books. I will say that there are

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00:25:37.450 --> 00:25:54.660

Adam Cmejla, CFP®: 3 or 4 books that are on my perennial always read annually, or will periodically go back like I don't have it built on the calendar of oh, it's March time to go back and read atomic habits, but I will always like that is good, if that is one of the books that I will always go back and read

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00:25:54.680 --> 00:25:58.210

Daren Chamblee: So that's awesome. Congrats. What are the other 2

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00:25:58.760 --> 00:26:08.870

Adam Cmejla, CFP®: so atomic habits for atomic habits for our work week. And then the one thing. By Gary Keller, I love Gary Keller in a way he wrote that book. The one thing.

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00:26:08.970 --> 00:26:15.060

Adam Cmejla, CFP®: what is the one thing such by doing this? One thing makes everything else in my life either irrelevant or not necessary.

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00:26:16.380 --> 00:26:23.799

Adam Cmejla, CFP®: which is like a second cousin to essentialism by Greg Mccall, which. whether it's Greg, whether it's essentialism or the one thing they

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00:26:23.940 --> 00:26:26.130

Adam Cmejla, CFP®: kind of vacillate back and forth

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00:26:27.970 --> 00:26:56.250

Allison Foulk: alright. Well, Darren, we are super proud of you, and we appreciate you, sharing what you

have learned. In the true, limitless style. We are going to give you a limitless book club prize for being well read. You can let us know that 3 books you would like if you have 3 on your list, or we will pick out 3 for you. But we just don't want you sending something you've already read.

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00:26:56.250 --> 00:27:20.490

Allison Foulk: Yes, thank you for sharing. Okay. So I'm gonna kick this one. If because Joslin is a member who has been with us for 6 years. Can you believe it or not? That is incredible. But she lives in Hawaii, and so this 9 Am. Call is a bit early for her, so she may or may not be here. She watches the recordings frequently, but we'll try to grab her to highlight her at some point.

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00:27:20.720 --> 00:27:41.890

Allison Foulk: Okay, Michelle, you are next to you. We're one of our lucky winners for our dry. Your future sketch prize for being on the last personal development call. So we just want you to go through this. Tell us what this process was like for you, and if it brought you any clarity.

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00:27:42.990 --> 00:28:04.229

Michelle Glass: Yes, so the draw. Your future thing. I'm so excited I won that I spent time with Taylan. He's a graphic artist, and he was pretty cool. I enjoyed talking to him so that draw your reality when I or draw your future. When I first heard about the exercise, and we watched the video.

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00:28:04.330 --> 00:28:16.090

Michelle Glass: It was kind of strange at first, because I cannot draw well at all. but it was so interesting to me how I was anxious to fill up the space on the paper.

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00:28:16.350 --> 00:28:18.250

Michelle Glass: And

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00:28:19.960 --> 00:28:35.500

Michelle Glass: Once I started digging into my current reality, and what I want the future to be like it was. It was interesting, so current reality. So the one picture there's like, a woman standing there, and she's got a little girl there.

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00:28:35.600 --> 00:28:43.790

Michelle Glass: that's that's me and my daughter. and that's always awesome.

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00:28:43.950 --> 00:28:48.810

Michelle Glass: And below us, if you can see there's a guy that's holding his head.

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00:28:49.060 --> 00:29:05.840

Michelle Glass: That's stressed out, Daddy. He's just completely stressed out. So that's him looking ridiculous. But a current reality. So I feel like there's no growth in my business.

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00:29:05.950 --> 00:29:10.600

Michelle Glass: You can see in a wallet up top.



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00:29:11.420 --> 00:29:22.539

Michelle Glass: I feel like there's not enough money now. It's not rent or ramen, as is often said. In limitless. It's not rent or ramen.

193

00:29:22.840 --> 00:29:29.699

Michelle Glass: but it's not where I want to be, and it's not what I'm capable of doing. So. I feel like.

194

00:29:29.770 --> 00:29:36.829

Michelle Glass: you know, the wallet could be a lot more full if I were to accomplish.

195

00:29:36.980 --> 00:29:43.209

Michelle Glass: You know what I know I'm capable of doing. And yeah, the no growth.

196

00:29:43.600 --> 00:29:50.539

Michelle Glass: one current reality. So I, the LinkedIn.

197

00:29:50.900 --> 00:29:51.910

Michelle Glass: I

198

00:29:52.110 --> 00:30:03.900

Michelle Glass: have over a thousand connections. So I started this year with like 75, or a hundred connections in January, and I've developed a thousand connections.

199

00:30:03.930 --> 00:30:08.659

Michelle Glass: but I don't know what to do with those connections which kind of sounds silly.

200

00:30:08.680 --> 00:30:22.210

Michelle Glass: So that's kind of my current reality. And he put that in there. He! He took everything that I vocalized or verbalized and put it

201

00:30:22.540 --> 00:30:28.790

Michelle Glass: in the picture. Then that frumpy looking lady over there next to the no growth

202

00:30:29.230 --> 00:30:45.970

Michelle Glass: that's supposed to be me, I guess, like I'm I'm here. I'm good. I'm not great. yeah, just kind of good, not great. So 3 bold steps. I need to

203

00:30:45.980 --> 00:30:57.300

Michelle Glass: service the hell out of my clients, my existing clients market like hell to my new ones. and I need to tell myself that growth is here. That's my mindset.

204

00:30:57.450 --> 00:31:13.350



Michelle Glass: Because I have caught myself throughout this year going. Oh, my God! When is this gonna happen? It's never, ever happening. It's not happening soon enough. I'm not seeing anything, you know, positive traction. So I need to kind of watch my mindset around that.

205

00:31:13.620 --> 00:31:19.649

Michelle Glass: And then desired reality. You can see I'm still with my daughter.

206

00:31:19.930 --> 00:31:31.230

Michelle Glass: And my husband looks a little happier, a little less stressed, and the picture and me it, instead of being just good. I'm now

207

00:31:31.500 --> 00:31:35.280

Michelle Glass: great and awesome, and there's

208

00:31:36.000 --> 00:31:37.280

Michelle Glass: money

209

00:31:38.690 --> 00:31:42.769

Michelle Glass: that is abundant, if you will, because of my efforts.

210

00:31:43.120 --> 00:31:54.840

Michelle Glass: Apparently Taylan thinks I'm going to grow my LinkedIn connections to like 10,000. Not so sure about that. But maybe that's his goal for me.

211

00:31:55.260 --> 00:32:06.880

Michelle Glass: little ski vacation. So our ski vacation family ski vacation. I want to have amazing adventures with my daughter. That's

212

00:32:07.560 --> 00:32:10.409

Michelle Glass: kind of my goal, and that's why the money

213

00:32:10.450 --> 00:32:17.340

Michelle Glass: is important to me is that I want to be able to do these things with her and show her what's possible in life.

214

00:32:17.510 --> 00:32:29.960

Michelle Glass: And then the house. So we we have a house now which we are going to tear her down and rebuild where we live.

215

00:32:30.440 --> 00:32:36.520

Michelle Glass: but God only knows when that's gonna happen. Obviously we need the money and the growth to make that happen. But

216



00:32:36.860 --> 00:32:49.079

Michelle Glass: Taylan took everything that I just said to you and put it on paper. So I think I'm going to print it out really big, and just put it up somewhere in my office so I can see it.

217

00:32:50.770 --> 00:32:54.139

Michelle Glass: So it was an awesome process

218

00:32:54.730 --> 00:32:55.700

Adam Cmejla, CFP®: very cool.

219

00:32:55.870 --> 00:32:57.250

Michelle Glass: Yeah, thank you.

220

00:32:57.750 --> 00:33:00.440

Allison Foulk: That's great, Michelle. Thank you so much for sharing.

221

00:33:00.450 --> 00:33:12.929

Adam Cmejla, CFP®: I'm right there with you. I struggled to draw stick figures so to do something like this is impressive. It was, you know what it was a lot of fun. He really took what was in my head

222

00:33:13.020 --> 00:33:16.939

Michelle Glass: and put it on paper. So I can.

223

00:33:17.140 --> 00:33:21.389

Michelle Glass: you know, see these things and visualize them into reality.

224

00:33:21.760 --> 00:33:29.670

Adam Cmejla, CFP®: Yeah, all this is th. These images like this are what can become part of your daily affirmations, and in in just

225

00:33:30.370 --> 00:33:48.710

Adam Cmejla, CFP®: tie everything that can be written that is written down, or that might be written down into something that is more clearly in in the form of a picture. Because right? What's the main thing is, keep the main thing. The the main thing is, keep the main thing, the main thing. And if this is the main thing.

226

00:33:48.760 --> 00:33:55.060

Adam Cmejla, CFP®: it's nice to have everything on one piece of paper that again you can print out and keep in front of you. So that's pretty cool.

227

00:33:55.200 --> 00:33:57.669

Michelle Glass: Yeah. So thanks for the opportunity.

228



00:33:57.850 --> 00:33:59.360
Allison Foulk: you're welcome.

229

00:33:59.700 --> 00:34:28.979

Allison Foulk: Thank you, Michelle. Alright. Now we are going to jump into our success. Spotlight. We have Samantha, Kim and Grant, and they are going to be sharing their year. How they have changed and implemented things. They'll go through and talk about it, and then I would love this to be conversational. So if you have a question for them feel free to unmute and just ask, and they can elaborate on the changes they've made and how what they've done has worked for them.

230

00:34:28.980 --> 00:34:33.960

Allison Foulk: So, Samantha, I believe you are first, so take it away

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00:34:34.090 --> 00:34:41.729

Samantha Blanchette: alright. Sounds good. I don't know if any of you were on the first breakout that we did in January.

232

00:34:41.830 --> 00:34:53.430

Samantha Blanchette: I bald. I came into this. We I'm actually not the owner of our business. The owner kind of put us through limitless because he wanted to work on our processes

233

00:34:53.449 --> 00:35:04.190

Samantha Blanchette: and kind of figuring out the best way to go about and he wanted me to go through it since I'm so new in the industry. What I have come out of all of this with is

234

00:35:04.770 --> 00:35:11.410

Samantha Blanchette: amazing. Like I would cry when I was put on spot because I didn't feel like I belonged where I am.

235

00:35:11.660 --> 00:35:19.409

Samantha Blanchette: And then my biggest breakthrough came with Liz in March she got me crying, and

236

00:35:19.500 --> 00:35:32.310

Samantha Blanchette: front of about 5 different people, and got me out of my shell. And that's when I started believing in myself and really moving forward. So, Liz, thank you. And now I'm gonna cry. I'm just the cry. So

237

00:35:32.310 --> 00:35:42.419

Samantha Blanchette: but looking through the different areas client wins. Our aum is up about 15 million versus last year. We wanted to be a little ahead of that, but

238

00:35:42.420 --> 00:36:03.970

Samantha Blanchette: we also had a new office thrown in. We had our first sec audit this year. And then the Schwab merger with Td. Ameritrade was. We had a lot on our plate this year, so for the 15 million we're up versus last year. Pretty proud of that, with everything we've been through. Mindset like, I said.



Limitless, has helped me break through my imposter syndrome

239

00:36:04.280 --> 00:36:06.430

Samantha Blanchette: when we started, I think I was

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00:36:06.450 --> 00:36:17.570

Samantha Blanchette: ready to take on a coo role and walk away from the advisor all completely. I didn't feel worthy of being in front of clients. I thought I was better served on the backside.

241

00:36:17.690 --> 00:36:33.800

Samantha Blanchette: and now I find myself in more client appointments, and I love it. Last week I actually had. We had one of our top 5 clients actually request to meet with me instead of the owner of the business, because they see it and be, and it was huge, so awesome.

242

00:36:33.860 --> 00:36:40.729

Samantha Blanchette: Yes, it's been great lifestyle. When I would say that I found my authenticity and excitement.

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00:36:40.920 --> 00:36:48.260

Samantha Blanchette: I found where I was struggling before, as I was trying to be just like the owner. I would go into the appointments.

244

00:36:48.320 --> 00:37:07.200

Samantha Blanchette: He's very much. He goes through investments, and that's about all he talks about, and I would get bored this appointment. So once I finally started making the appointments about the clients that are in front of me, and really caring about what they needed and what they were there for, and their pain points instead of just the

245

00:37:07.290 --> 00:37:27.859

Samantha Blanchette: investments that I think they expect us to come up with for them. Anyways, I don't go to my doctor and ask them why they're putting me on a prescription. I trust them, and I think they're putting their trust in us for those investments. I feel so much more comfortable in those equipments, and I'm really enjoying it, and the clients are enjoying it, too. So huge, huge win.

246

00:37:27.880 --> 00:37:42.649

Samantha Blanchette: We are working on restructuring our service model. We're a little bit different than a lot of people on this call. We do k through 12403 B. So we 2 advisors. We have almost 600 households.

247

00:37:42.680 --> 00:37:52.569

Samantha Blanchette: We were trying to service everyone the same way before limitless. But we're now restructuring so that those clients that are kind of just 40 threeeb. Clients we're going to be

248

00:37:52.670 --> 00:38:19.300

Samantha Blanchette: reaching out to them quarterly, but not doing more of the appointments that we



weren't getting them to reach out for anyways and wasting our time and their time just chasing them. Now we'll give them quarterly bits of information that will help them and not have to chase on our end, and we can do that all in one surge. And we have started implementing surge weeks where it's not constantly Monday, through Friday appointments all the time.

249

00:38:19.390 --> 00:38:42.260

Samantha Blanchette: And we don't have time to play catch up. So marketing. We really haven't done much marketing with everything that's happened throughout the year. But next year. Webinars are the number. One thing on my list is to get those out to the school districts around and try and grow our practice more with right. Now we see more people opening 40. Three's that are new. But I think we have a huge

250

00:38:42.330 --> 00:38:56.759

Samantha Blanchette: business with the people that are getting close to retirement because none of the other advisors in this area offer retirement planning or understand their pension like we do. So that's kind of the I'm gonna go after that and see how many Rollovers we can get through that.

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00:38:57.540 --> 00:39:10.019

Samantha Blanchette: But yes, limitless has been amazing. All the friendships I've made through. I've met a lot of great people, and just to have those people that I can reach out to in turn to has been wonderful. So thank you to everyone

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00:39:10.780 --> 00:39:13.059

Adam Cmejla, CFP®: that's so cool. Thank you for sharing.

253

00:39:13.110 --> 00:39:15.179

Adam Cmejla, CFP®: Yeah, thank you for sharing

254

00:39:16.590 --> 00:39:43.040

Allison Foulk: awesome. Samantha. Jeff was actually on one of our. We're we're doing a office hours call with prospect on Thursday, and we just had someone asking Jeff about like the limitless community. Do you actually feel supported? Get to know other people? He was sharing his experience that it, you know, really been community building for him, and glad that you found that as well, and that you're continuing to have success in all these other areas.

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00:39:43.370 --> 00:39:50.190

If anyone has a question or comment, I see quite a few here in the chat, Samantha, so you'll have to take a look there.

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00:39:50.260 --> 00:39:53.320

Allison Foulk: But for Samantha feel free to just

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00:39:53.460 --> 00:39:54.880

unmute.

258



00:39:55.040 --> 00:40:02.370

Allison Foulk: And Liz, it sounds like you played a huge part in the growth that Matt has seen this year.

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00:40:02.590 --> 00:40:05.319

So we really appreciate the work that you do.

260

00:40:06.150 --> 00:40:07.590

Samantha Blanchette: Yes, she's wonderful.

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00:40:08.340 --> 00:40:10.000

Samantha Blanchette: Okay.

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00:40:10.630 --> 00:40:25.629

Adam Cmejla, CFP®: Samantha, with your with your referrals, Samantha. Real quick question on the referrals. I think that's awesome, that it was all organic and word of mouth. And I think that's in in the marketing that we talk about here at limitless. Sometimes. Admittedly, I think we

263

00:40:25.730 --> 00:40:38.170

Adam Cmejla, CFP®: we talk about all these different growth channels. Right? Is it gonna be? Or is it gonna be digital. And, you know, blogging or podcasting, or Youtube, is it gonna be traditional in direct mail or seminars, workshops, webinars, etc.

264

00:40:38.230 --> 00:41:07.969

Adam Cmejla, CFP®: Admittedly, you know, we really haven't done a very deep dive. I know Tiffany's done client advisory boards. We've talked about those as well. But from referral standpoint, we it it hasn't been a focus of ours from a growth standpoint, because that's not typically what people think of from a growth, because we're going after new relationships and for advisors that maybe don't have the ideal type of practice that they want where they'd want to replicate the people that their clients would refer them to sometimes. That's not a viable option for you. That clearly was.

265

00:41:08.150 --> 00:41:19.890

Adam Cmejla, CFP®: Can you talk briefly through? You know what you did to grow organically through word of mouth, like where you intentionally asking clients as part of the review cycle.

266

00:41:20.250 --> 00:41:41.999

Samantha Blanchette: No, it's basically just you find in the school district. They talk. They're talking about everything. And that's how we know the other advisors. If they ask anything about the pension plan, they say, Okay, go to the website or call them. They are not able to help them

267

00:41:42.070 --> 00:41:53.450

Samantha Blanchette: with anything to do with their pension. So our clients, just tell them. You know we've gotten that throughout. They tell us about our pension that we know how it works because of them.

268

00:41:53.560 --> 00:42:17.079



Samantha Blanchette: and that in itself has gotten us a lot we don't even have to ask. It's like, I've actually shut off our calendar a couple of times this year. So and it's hard because I'm not the owner, and he doesn't want to. So we've had a little bit of a struggle there. He doesn't know how to say no, and I wish he would do more of the limitless with me to learn, saying, No to people is okay, but

269

00:42:17.080 --> 00:42:25.790

Samantha Blanchette: I've had to shut down the calendar, and I. What I noticed is I would block acuity for 3 months taking on new clients, and we would see people.

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00:42:26.000 --> 00:42:40.419

Samantha Blanchette: you know, doing 3 months out, and a lot of our new clients lately have been doctors because of teachers who are married to doctors. And then now the doctors are starting to talk about us. So it's kind of opening up a new revenue.

271

00:42:40.590 --> 00:42:54.740

Adam Cmejla, CFP®: Well, to your point. It's it's not a no, it's just a not yet. I think that that would be the message to communicate to the to your own, or if he hasn't explicitly understood that it's like, no, we're not saying no, we're just not yet like

272

00:42:54.940 --> 00:43:07.750

Samantha Blanchette: boundaries or anything like anyone can come in and do whatever they want. You mentioned. You haven't made much changes, though, but I'm curious. What

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00:43:07.820 --> 00:43:24.729

Adam Cmejla, CFP®: like? Why are the Referrals happening this year, and not in years prior, or were they happening new years? Prior? It's just like, what could you attribute it to it? Do you think it's the service that you're doing that you had a more concerted, intentional way in which you've been engaging clients this year as opposed to years past, that has.

274

00:43:24.950 --> 00:43:36.439

Adam Cmejla, CFP®: I'm I'm trying to. I'm trying to fish and dig into. What is the actionable insight that you can observe that has made the impact this year for getting referrals that maybe wasn't happening in years. Prior.

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00:43:36.510 --> 00:43:46.680

Samantha Blanchette: I would say, one thing is, the owners not just trying to take it on himself. He's showing that it's him. And I like. We're a team now. And I think that's

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00:43:46.970 --> 00:43:58.590

Samantha Blanchette: helped a lot with the clients. I'm seeing a lot more confidence. He's telling them, you know. This is my succession plan she'll be taking over. He's, you know, having me meet them earlier in

277

00:43:59.070 --> 00:44:11.049

Samantha Blanchette: are when they come in, and I think that's helped out a lot, just his confidence towards me and them not knowing like what. Ha! What if something happens to him? He's 57 years old.



What's gonna happen to me if he's gone.

278

00:44:11.230 --> 00:44:12.040

Samantha Blanchette: So

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00:44:12.800 --> 00:44:22.699

Adam Cmejla, CFP®: very good, very good congrats, I think that. And and I'd appreciate you sharing, because I think that can be sometimes the frustrating part of getting referrals is.

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00:44:23.040 --> 00:44:29.669

Adam Cmejla, CFP®: unless you're explicitly asking the client. So why did you refer Jane and Jim over to us?

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00:44:29.920 --> 00:44:48.819

Adam Cmejla, CFP®: Sometimes we can be left in the dark. Understandings like, why are, why are we getting these? How can we replicate? You know? What are we doing in the firm right now that is working to bring in arguably the lowest cost. Right? If we look at client acquisition costs, which we all should be as a business metric. Referrals have

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00:44:48.820 --> 00:45:00.239

Adam Cmejla, CFP®: arguably the lowest cac of any other channel out there. So if an advisor is successful in getting referrals from either clients and or cois.

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00:45:00.300 --> 00:45:05.569

Adam Cmejla, CFP®: granted, we've got the coy program pretty dialed in limitless. And what we present talk about.

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00:45:05.870 --> 00:45:11.430

Adam Cmejla, CFP®: But if there's something that's working on the referral side, which could be more

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00:45:11.560 --> 00:45:25.579

Adam Cmejla, CFP®: like, there could be a wider spectrum of what is working for a firm. It's always nice to try and know what are we doing that is actually having that impact to have clients feel comfortable enough making introductions to us. So appreciate you sharing. Thank you.

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00:45:26.160 --> 00:45:31.499

Allison Foulk: Okay, thank you. Samantha. Okay, next up, we have

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00:45:32.010 --> 00:45:38.430

Allison Foulk: Kim. So we are excited to hear from you about this year, and the changes that you've made.

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00:45:39.610 --> 00:45:43.260

Kim Abmeyer, CFA, CFP®: Hi, yeah, alright.



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00:45:43.660 --> 00:45:53.340

Kim Abmeyer, CFA, CFP®: So let's see, this is my, I should preface, this is my second year at limitless, and I say I make that statement first, because the first year was

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00:45:53.970 --> 00:45:58.550

Kim Abmeyer, CFA, CFP®: I came in as an advisor that literally winged everything

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00:45:59.060 --> 00:46:06.740

Kim Abmeyer, CFA, CFP®: and limitless was like I've heard someone mentioned earlier before. It was like a fire hose, and I had a really hard time

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00:46:07.520 --> 00:46:10.729

Kim Abmeyer, CFA, CFP®: figuring out what I should focus on.

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00:46:11.050 --> 00:46:13.969

Kim Abmeyer, CFA, CFP®: I really

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00:46:14.260 --> 00:46:25.640

Kim Abmeyer, CFA, CFP®: ended up spending probably that first year trying to figure out what my niche was. What's my brand who do I work with? Who do? I want to work with?

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00:46:25.830 --> 00:46:29.369

Kim Abmeyer, CFA, CFP®: And I think we finally got that nailed down.

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00:46:29.870 --> 00:46:34.210

Kim Abmeyer, CFA, CFP®: But long story short, at the end of last year

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00:46:34.360 --> 00:46:42.189

Kim Abmeyer, CFA, CFP®: I remember being on our mastermind call, and Stephanie was a guest. and she kept hammering

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00:46:42.690 --> 00:46:48.439

Kim Abmeyer, CFA, CFP®: to me. How important it was that I needed to hire someone, cause I would have. I was kind of at a

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00:46:48.770 --> 00:46:52.939

Kim Abmeyer, CFA, CFP®: fairly high a UN. To be running by myself.

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00:46:53.360 --> 00:47:05.429

Kim Abmeyer, CFA, CFP®: and I was doing. I do all of the investment management internally, myself, and I was trying to do all the planning as well, and it was just a bit overwhelming growth was kind of nonexistent



301

00:47:05.810 --> 00:47:15.870

Kim Abmeyer, CFA, CFP®: in March of this year I lost a big client right? When kind of that bank crisis hit in March

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00:47:17.540 --> 00:47:18.410

Kim Abmeyer, CFA, CFP®: and

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00:47:18.910 --> 00:47:27.600

Kim Abmeyer, CFA, CFP®: based on my lack of depth of bench, so to speak. He like somewhat like

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00:47:27.860 --> 00:47:39.780

Kim Abmeyer, CFA, CFP®: we just heard about. He didn't feel comfortable about not having a succession plan. What if something happened to me? I did everything here. So it was kind of really pushed me

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00:47:39.820 --> 00:47:45.760

Kim Abmeyer, CFA, CFP®: to make that decision to hire someone, so I would say that that has been

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00:47:45.880 --> 00:47:51.220

Kim Abmeyer, CFA, CFP®: by far my biggest win. My! She's a friend of mine.

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00:47:51.370 --> 00:48:03.109

Kim Abmeyer, CFA, CFP®: Which luckily she was looking for another opportunity. So my friend Alicia joined me in August. and sure, sweet spot, and what she loves to do is the planning.

308

00:48:03.630 --> 00:48:16.940

Kim Abmeyer, CFA, CFP®: and my love is the investment management. So it's a really, it's turned into a really great partnership. so I would say. my clients have also been really receptive to that.

309

00:48:17.380 --> 00:48:22.500

Kim Abmeyer, CFA, CFP®: they they. It's been a slow process, but they've

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00:48:23.370 --> 00:48:31.669

Kim Abmeyer, CFA, CFP®: come more into embracing this, the the planning side of the business. So they really are enjoying having someone that's truly dedicated to that. So

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00:48:31.800 --> 00:48:50.229

Kim Abmeyer, CFA, CFP®: that's also helping in that same with in that same line of value when being more intentional with cois. Now that there are 2 of us it kind of gives us we're a little bit better. We've got more capacity to kind of broaden our networks. Alicia brings in

312

00:48:50.370 --> 00:48:57.679



Kim Abmeyer, CFA, CFP®: people that she knows from her prior firm and and friends in the in the neighborhood, in the industry.

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00:48:57.780 --> 00:49:01.860

Kim Abmeyer, CFA, CFP®: So it's allowing us to be a little bit more

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00:49:04.350 --> 00:49:07.489

Kim Abmeyer, CFA, CFP®: capable, I guess, of building out those networks.

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00:49:07.610 --> 00:49:10.300

Kim Abmeyer, CFA, CFP®: let's see.

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00:49:10.540 --> 00:49:15.269

Kim Abmeyer, CFA, CFP®: we are. Let's see, I'm going to go off my list, because it's I've got it all a little more.

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00:49:15.490 --> 00:49:19.450

Kim Abmeyer, CFA, CFP®: I'd say. The second biggest thing which I think all of you may appreciate.

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00:49:19.540 --> 00:49:27.779

Kim Abmeyer, CFA, CFP®: Some of you may appreciate. In the first year we were introduced to so many new technologies to help us become more efficient.

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00:49:28.580 --> 00:49:32.940

Kim Abmeyer, CFA, CFP®: which was wonderful. Except for someone like me who loves technology.

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00:49:33.190 --> 00:49:39.110

Kim Abmeyer, CFA, CFP®: I went nuts and literally signed up for, like all of them

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00:49:39.160 --> 00:49:44.679

Kim Abmeyer, CFA, CFP®: to the point that it became inefficient because we're trying to manage too many things.

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00:49:45.390 --> 00:49:55.490

Kim Abmeyer, CFA, CFP®: So, with Alicia coming in fresh eyes on everything she really was like, you've got to cut some of this out. So I have actually now de cluttered

323

00:49:55.890 --> 00:49:59.820

Kim Abmeyer, CFA, CFP®: the tech stack that I had cluttered

324

00:49:59.840 --> 00:50:09.729

Kim Abmeyer, CFA, CFP®: which has been really helpful and trying in in getting us like more aligned I did engage.



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00:50:10.580 --> 00:50:14.500

Kim Abmeyer, CFA, CFP®: We worked with them several times, Herberz and Company

326

00:50:14.550 --> 00:50:25.860

Kim Abmeyer, CFA, CFP®: as a consultant to help me. When I brought Alicia on, they helped me truly design my firm like what it looks like. Compensation

327

00:50:25.890 --> 00:50:30.800

Kim Abmeyer, CFA, CFP®: structure, planner or advisor track and

328

00:50:31.370 --> 00:50:42.710

Kim Abmeyer, CFA, CFP®: operations track. So that's been really helpful. They're helping us with our branding. We've kind of dialed into business owners,

329

00:50:43.150 --> 00:50:59.390

Kim Abmeyer, CFA, CFP®: business professionals. And then we're still trying to figure out how to really beef up without excluding which I know it's okay to exclude. But we'd really also like to work intentionally like with women in those sectors as well. So or such areas.

330

00:50:59.430 --> 00:51:03.630

Kim Abmeyer, CFA, CFP®: So we're working on that building out the brand

331

00:51:03.690 --> 00:51:11.699

Kim Abmeyer, CFA, CFP®: we're revamping our website, to. We've talked about marketing. We really want to be more intentional with our marketing this year, because

332

00:51:12.120 --> 00:51:17.329

Kim Abmeyer, CFA, CFP®: I really haven't done much at all ever in the marketing area. So

333

00:51:17.560 --> 00:51:18.510

Kim Abmeyer, CFA, CFP®: and

334

00:51:19.280 --> 00:51:25.560

Kim Abmeyer, CFA, CFP®: 3 crowns is helping us redo our website and our deliverables to make that really cohesive.

335

00:51:25.890 --> 00:51:36.939

Kim Abmeyer, CFA, CFP®: let's see, I guess along with that we're we'd like to start doing webinars. We have a lot. We found some new opportunities with

336

00:51:37.050 --> 00:51:40.210

Kim Abmeyer, CFA, CFP®: women in corporations that



337

00:51:40.480 --> 00:51:44.709

Kim Abmeyer, CFA, CFP®: really have never been

338

00:51:44.760 --> 00:51:55.120

Kim Abmeyer, CFA, CFP®: educated on how to best utilize their benefits. And so we're kind of working on what we'd like to kind of rinse and repeat

339

00:51:55.230 --> 00:52:02.170

Kim Abmeyer, CFA, CFP®: with women in companies to best utilize their benefits, to really set them up for success.

340

00:52:02.600 --> 00:52:05.780

Kim Abmeyer, CFA, CFP®: So we've got a lot of marketing

341

00:52:06.120 --> 00:52:13.399

Kim Abmeyer, CFA, CFP®: new marketing, I guess. Like energy. It's definitely become a lot more fun having a a partner.

342

00:52:13.650 --> 00:52:23.230

Kim Abmeyer, CFA, CFP®: And then our sales assistant is a is a woman also. So we are now kind of like marketing that we are a female led women led advisory firm.

343

00:52:23.550 --> 00:52:43.700

Kim Abmeyer, CFA, CFP®: and then we've really dialed into. We started using you mentioned traction earlier. Really, that Eos model like we've got quarterly rocks. We do our weekly meetings. On Thursday we'll we have our planning kind of our quarterly planning meeting

344

00:52:43.990 --> 00:52:48.790

Kim Abmeyer, CFA, CFP®: slash annual meeting for next year.

345

00:52:48.830 --> 00:52:52.129

Kim Abmeyer, CFA, CFP®: So I'd say another thing I've it's become.

346

00:52:52.690 --> 00:53:00.069

Kim Abmeyer, CFA, CFP®: I've really started being a more intentional business owner. I feel like, thanks to limitless instead of just

347

00:53:00.650 --> 00:53:11.889

Kim Abmeyer, CFA, CFP®: winging it. Of course, now that I have, like a true employee, I share my sales assistant with 2 other advisors, but now that I have a true employee who I've committed a nice chunk of capital towards

348



00:53:12.090 --> 00:53:14.050
Kim Abmeyer, CFA, CFP®: it's

349

00:53:14.120 --> 00:53:20.750
Kim Abmeyer, CFA, CFP®: kind of forced me into being a more intentional business owner. So

350

00:53:21.330 --> 00:53:25.570
Kim Abmeyer, CFA, CFP®: I definitely credit limitless for helping me

351

00:53:26.300 --> 00:53:31.989
Kim Abmeyer, CFA, CFP®: helping me. It's taken time. So I do. I think also one of my

352

00:53:32.570 --> 00:53:35.779
Kim Abmeyer, CFA, CFP®: when or when's I guess you could say is.

353

00:53:36.080 --> 00:53:44.769
Kim Abmeyer, CFA, CFP®: I really think you've got at least go like 2 or 3 years in the program. Right? Cause that that first year is just like, where do I start?

354

00:53:45.450 --> 00:53:48.210
Kim Abmeyer, CFA, CFP®: The second year is kind of like. Okay.

355

00:53:48.540 --> 00:53:53.830
Kim Abmeyer, CFA, CFP®: you figured out what are the more important areas, or maybe the more

356

00:53:54.390 --> 00:53:58.580
Kim Abmeyer, CFA, CFP®: near term, like immediate things that you should be working on?

357

00:53:58.710 --> 00:54:02.290
Kim Abmeyer, CFA, CFP®: and then

358

00:54:02.860 --> 00:54:05.529
Kim Abmeyer, CFA, CFP®: we'll we'll see about the third year. But

359

00:54:05.740 --> 00:54:15.080
Kim Abmeyer, CFA, CFP®: I do think now I've I've been able to take everything that I've learned from the program. And now it's kind of like implementation mode, right? Like, let's execute.

360

00:54:15.330 --> 00:54:22.869
Kim Abmeyer, CFA, CFP®: I can't. I don't want to hide in the safety of learning anymore. I've got to like, get out there and actually do it.

361



00:54:23.130 --> 00:54:33.309

Kim Abmeyer, CFA, CFP®: I will say, with our service model, we did. We have beefed that up again with Alicia coming in. We're going a little head deeper into tax planning. So

362

00:54:34.170 --> 00:54:40.740

Kim Abmeyer, CFA, CFP®: I'm 2 of 3 exams into my enrolled agent. Credential. So

363

00:54:40.850 --> 00:54:48.409

Kim Abmeyer, CFA, CFP®: I don't know, we're just constantly trying to build out the best service model that we can provide

364

00:54:48.890 --> 00:54:52.870

Kim Abmeyer, CFA, CFP®: while holding ourselves accountable and doing it in a

365

00:54:53.800 --> 00:54:55.080

Kim Abmeyer, CFA, CFP®: financially

366

00:54:55.430 --> 00:54:58.460

Kim Abmeyer, CFA, CFP®: responsible and efficient way.

367

00:55:01.000 --> 00:55:05.679

Kim Abmeyer, CFA, CFP®: When I wrote it. When I wrote it all down, I realized it's one of maybe, and we should all do it.

368

00:55:05.960 --> 00:55:12.329

Kim Abmeyer, CFA, CFP®: I don't think you realize how much you've kind of accomplished right until someone asks you to like, write it all down. And you're like, Okay.

369

00:55:14.510 --> 00:55:15.970

Kim Abmeyer, CFA, CFP®: so it's been a fun year.

370

00:55:16.830 --> 00:55:28.209

Adam Cmejla, CFP®: It can be very easy to just look at the day to day, week to week, and just keep doing and keep doing and keep doing. But if we don't measure and this I mean, this goes back to one of

371

00:55:28.360 --> 00:55:39.960

Adam Cmejla, CFP®: in in Dan Sullivan. Right? Wrote the book gap in a game right, which is one of the 4 pillar books of strategic coach and

372

00:55:40.550 --> 00:56:01.159

Adam Cmejla, CFP®: the. And it's the the book. It's one of the books that he turned that he originally wrote in a very thin version, and it's one that him and Ben Hardy, Dr. Ben Hardy went back in kind of built into an expanded volume of it. But what you're stating right? There is exactly the point of the gap in the game, the the point there is. If we are always trying to measure ourself to some future ideal.



373

00:56:01.520 --> 00:56:04.450

Adam Cmejla, CFP®: I want to be a successful and efficient advisor.

374

00:56:04.840 --> 00:56:10.609

Adam Cmejla, CFP®: What the hell does that mean? Right? We can put ourselves into such a state of stress and

375

00:56:10.650 --> 00:56:28.429

Adam Cmejla, CFP®: into a situation where we're never feeling worthy or we're like you can't. It's an ideal you can't accomplish an ideal you can't accomplish. There is no way to measure what a quote, unquote, successful, and efficient advisor is. That's an ideal, that is.

376

00:56:28.740 --> 00:56:32.920

Adam Cmejla, CFP®: again, it's an abstract. It's a good idea, and it's something to

377

00:56:33.250 --> 00:56:54.399

Adam Cmejla, CFP®: to use as a guiding compass and principle around how we show up in our business. But it should not be the measuring stick we use to determine the success that we have. Rather let's use the gain. Where were we when we first started? And what have we accomplished up until this point? So when we go through goal setting right when you.

378

00:56:54.400 --> 00:57:05.480

Adam Cmejla, CFP®: when you look at traction and you're implementing your your level tens, and your big rocks and your quarterly reviews. Yes, you have this ideal of what you're building the practice to.

379

00:57:05.920 --> 00:57:15.839

Adam Cmejla, CFP®: But in Gino is a long, long time member of coach. Right? So the the book is written very intentionally and and very complementary to this idea.

380

00:57:16.100 --> 00:57:35.100

Adam Cmejla, CFP®: Yes, you are building and and executing on strategies that are in service to this ideal. But when you're measuring how successful they are, we're looking back. We're looking. Okay, where were we when we started this, and how much progress have we made? Because that is very measurable. And we could use that to exactly what you just said at the end. Here.

381

00:57:35.390 --> 00:57:46.779

Adam Cmejla, CFP®: sometimes we. It's easy to lose sight of how much we've actually accomplished until we actually sit down, put pen to paper or keystroke to screen and say. holy smokes like

382

00:57:47.700 --> 00:57:59.210

Adam Cmejla, CFP®: I got a lot done, and here's the result of the execution of that which I think goes goes back to it, goes back to what Samantha mentioned. Where

383



00:57:59.580 --> 00:58:01.000

Adam Cmejla, CFP®: what was it? Just gonna say.

384

00:58:01.290 --> 00:58:05.810

Adam Cmejla, CFP®: I was just gonna say something to what? To what? I heard her say,

385

00:58:07.970 --> 00:58:17.210

Allison Foulk: wow! That is like the shortest amount of time from having the thought to losing it like that was 3 tenths of a second. I feel like, because I cannot remember

386

00:58:17.820 --> 00:58:28.040

Adam Cmejla, CFP®: you caught my Adhd. I'm sorry, holy, smooth. Il mean, I've had that happen before where I have something I want to say. And then by the time I complete the sentence and get to what I want to say I forget it.

387

00:58:28.490 --> 00:58:39.970

Adam Cmejla, CFP®: This was an all time record cause. I am clueless as to what I was trying to bridge the gap there between, and usually, if I stop thinking about it, it'll come. It'll come to me, and whatever. I'll just kinda

388

00:58:40.400 --> 00:58:56.840

Allison Foulk: let it go. But anyway, all that to say congrats, Kim. I think that's awesome. Thank you for sharing the journey meandering journey. I think that you've been on, and that is not. That is common with advisors that go through limitless, myself included. Right? It is not a straight linear line

389

00:58:57.190 --> 00:59:11.390

Adam Cmejla, CFP®: that we go through. It is a meandering 2 steps forward, sometimes 3. Step back to, then be 5 steps forward, coming back like it. It is a journey. So thank you for sharing. That's awesome congrats on the success.

390

00:59:11.930 --> 00:59:19.710

Allison Foulk: Thank you, Kim. Okay. Next, we have Grant. We are excited to hear from him.

391

00:59:19.970 --> 00:59:24.099

Allison Foulk: So Grant, go ahead and share with us what this year has been like for you?

392

00:59:24.910 --> 00:59:29.830

Grant Bledsoe: Sure. So like Kim, this is my second year in the program.

393

00:59:29.850 --> 00:59:50.239

Grant Bledsoe: And Kim, Il don't think I could agree with you anymore. This is really like a A 2 or 3 year program where for me, the first 12 months we're really learning all the stuff that the program wanted to teach us. And then this year, I I've been much better able to really implement it, and pick and choose and figure out how it was all going to work in my practice.



394

00:59:50.410 --> 01:00:12.649

Grant Bledsoe: for me personally. 22. So my first year in the program. Last year I was doing a pretty good job of keeping up with the curriculum and all that, and then kind of putting stuff to work throughout the year, and then in. I guess it was the end of July last year my mother-in-law checked herself into the hospital. Wasn't feeling well, vertigo kind of symptoms.

395

01:00:12.720 --> 01:00:28.749

Grant Bledsoe: learned a couple of days later that she had leukemia really aggressive form of it in 4 weeks, almost to the day after that she's gone. So last year I was about halfway into the year doing a really good job keeping up, and then the rest of my year kind of got disrupted.

396

01:00:28.770 --> 01:00:32.410

Grant Bledsoe: So we've we've all had, you know, stuff, personal tragedy hit.

397

01:00:32.830 --> 01:00:39.890

Grant Bledsoe: We're all gonna have it hit a lot, you know, over the rest of our lives, and as as everybody knows, when when that kind of stuff happens.

398

01:00:40.260 --> 01:00:46.489

Grant Bledsoe: you you just figure out a way to put the professional stuff aside. Figure out what you do to go into maintenance mode.

399

01:00:46.580 --> 01:00:59.229

Grant Bledsoe: You know. Make sure that the lights are on. The clients are taken care of, and then focus on what you need to do to to help your family, really. So for us, we we've got 3 kids at home my wife stays home with them.

400

01:00:59.410 --> 01:01:05.199

Grant Bledsoe: Basically, I needed to take that over full time at the drop of a hat last at the end of last summer.

401

01:01:05.230 --> 01:01:06.590

Grant Bledsoe: So

402

01:01:06.790 --> 01:01:16.110

Grant Bledsoe: this year we were able to refocus a little bit, and really get back to the curriculum. And thus far it's been a a a very good year. So far.

403

01:01:16.130 --> 01:01:29.679

Grant Bledsoe: So a a couple of the the wins and in the stuff that's worked really well we hired a new associate planner at the end of who's doing really well, and is really working out well for our practice.

404

01:01:29.920 --> 01:01:44.470

Grant Bledsoe: We've had a really good marketing wise thus so thus far in. I think we have about 68,000



in new recurring revenue that we've brought on, and a couple of other pending proposals that could push that a little bit higher.

405

01:01:44.690 --> 01:01:49.569

Grant Bledsoe: If you think back to the sequence of the limitless curriculum.

406

01:01:49.590 --> 01:01:56.320

Grant Bledsoe: the the first part of it is all about personal mindset stuff, and then it goes into service, model niche and value. Add

407

01:01:56.360 --> 01:01:58.990

Grant Bledsoe: a couple of the things that have worked really well for me

408

01:01:59.200 --> 01:02:12.139

Grant Bledsoe: is I've I've tinkered with my own morning routine for a long time in some mix of exercise and meditation and all the stuff. Stephanie, you know, talks about a lot in the program, and

409

01:02:12.250 --> 01:02:21.929

Grant Bledsoe: at at some point I guess it was the end of Q. One. This year. I just found a mix that really clicked with me, and so for me, I get up every morning a little bit after 6 am.

410

01:02:22.000 --> 01:02:26.719

Grant Bledsoe: I walk into the shower, and I turn it on as cold as it'll go for about 2 min.

411

01:02:27.110 --> 01:02:32.389

Grant Bledsoe: and it sucks every single time that I turned it on.

412

01:02:32.670 --> 01:02:53.799

Grant Bledsoe: but for some reason, and I can't articulate the physiological benefits. But for some reason the rest of the day just seems to be a little bit better. If you have that physical challenge and physical adversity first thing in the morning. For some reason it just works so for me, I take a really cold shower. I meditate for about 15 min, and then I get about 45 min of exercise in.

413

01:02:53.800 --> 01:03:13.980

Grant Bledsoe: And that's just for some reason the the secret sauce that has helped me get to work with the right mindset and really focus on on what I need to focus on. So that's been a win we've had a really good quarter client wise this quarter, and really in general, after spending last year going through the curriculum

414

01:03:14.320 --> 01:03:19.090

Grant Bledsoe: figuring out how we were going to apply the the

415

01:03:19.360 --> 01:03:36.819

Grant Bledsoe: gamut of the curriculum to our practice. Now, you know, refocusing back in January of



23, after everything went through last year, and really putting it all into place. And in an effective way, has just worked great. So a couple of examples of that

416

01:03:36.870 --> 01:03:47.830

Grant Bledsoe: our, our, we revise the client service model last year, and we got holistic plan. We started sending a tax letter for the first time this January. We do an estate planning deliverable every June. Now

417

01:03:47.900 --> 01:03:56.929

Grant Bledsoe: we do tax projections. And at the end of beginning of before a last surge of the year. Last year we were kind of figuring all that stuff out.

418

01:03:56.940 --> 01:04:00.320

Grant Bledsoe: And and as everybody going through the curriculum.

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01:04:00.650 --> 01:04:02.820

I think, has probably learned

420

01:04:03.080 --> 01:04:09.299

Grant Bledsoe: you, you you kind of guess, and you test. And you just figure stuff out, and I don't know. I'm trying to

421

01:04:09.400 --> 01:04:14.529

Grant Bledsoe: paraphrase you're saying, here is it? Build the airplane as you're flying. Does that sound right? Something like that?

422

01:04:14.640 --> 01:04:43.519

Grant Bledsoe: That's that's the idea. Right? And so now, being in the second cycle of that, we've we have a model that's working and we're really able to make that service model sink in a very efficient way because it's hooked up with our Crm. We have a lot of automation around it. The team is all on board. And and it's it's it's really starting to build momentum for all the client service, the operations, the marketing, all of it, is is really starting to gel and

423

01:04:43.650 --> 01:04:52.310

Grant Bledsoe: give us a lot of momentum, and I think the success we've had in is is a byproduct of all that. So it's been a good year, you know. It's been

424

01:04:52.680 --> 01:05:05.300

Grant Bledsoe: ups and downs like everybody. But I'm really happy that I did it, and and just to echo. What Kim said. The second lap around the program has really

425

01:05:05.400 --> 01:05:10.209

Grant Bledsoe: enabled me and and our the rest of our team. We have 2 2 other people here.

426

01:05:10.350 --> 01:05:16.130

Grant Bledsoe: To put the stuff to use with confidence in a way that's gonna work for us.

427

01:05:16.260 --> 01:05:17.849

Grant Bledsoe: indefinitely going forward

428

01:05:23.200 --> 01:05:27.030

Adam Cmejla, CFP®: very cool. very, very cool. Thank you for sharing Grant. Appreciate it.

429

01:05:27.420 --> 01:05:28.450

Grant Bledsoe: appreciate it.

430

01:05:29.730 --> 01:05:33.299

Adam Cmejla, CFP®: I still can't do the cold shower thing I've tried.

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01:05:33.960 --> 01:05:43.120

Adam Cmejla, CFP®: Il the best that I've been able to do is then like to take a normal shower and then incrementally get it colder on that last 2 to 3 min or so

432

01:05:43.450 --> 01:05:57.499

Adam Cmejla, CFP®: that that works and I agree it does it. You feel good, Il think. Huh! I don't have the willpower to be able to embrace the suck right away in the morning like that, like

433

01:05:57.830 --> 01:06:02.620

Grant Bledsoe: all the credit to you, Dude, that's awesome. My! My first one was 10 s long.

434

01:06:02.850 --> 01:06:15.479

Grant Bledsoe: I live in Sacramento right? And so in the wintertime it gets relatively cold, but in the summertime it's it's kind of a struggle to get the the water cold water. Yeah, but you know Il turn it on. It's cold and you're

435

01:06:15.620 --> 01:06:26.910

Grant Bledsoe: breathing wrap. You're you're you're trying to meter out your breath a little bit and then they went from 10 s to 15 s, and then on and on. But it's I'm

436

01:06:27.750 --> 01:06:32.480

Grant Bledsoe: I really like it now. It sucks every single day. But I really like the how the rest of the day goes.

437

01:06:32.930 --> 01:06:42.739

Adam Cmejla, CFP®: I do remember doing it. The first time I learned about cold showers was after learning about the Wim Hof breathing method. Where, if you if you embrace the Wim Hof breathing method, which is.

438



01:06:42.900 --> 01:07:03.109

Adam Cmejla, CFP®: if if anybody's not familiar with it, it is basically you start out laying on your back. It's 30 35 very deep, but in emphatic breath. So all the way, in, all the way out, all the way in all the way out into the nose, out through the mouth. You do that for 35 times. You're like hyper oxygenating yourself, and then I think it's you a 30 or 35

439

01:07:03.110 --> 01:07:13.850

Adam Cmejla, CFP®: on that 30 fifth breath you exhale, and you hold your breath on the exhale, not on the inhale, which sounds counterintuitive, but on that 30 fifth breath you exhale. Hold your breath.

440

01:07:13.890 --> 01:07:15.000

Adam Cmejla, CFP®: and

441

01:07:15.450 --> 01:07:17.389

Adam Cmejla, CFP®: it is

442

01:07:17.520 --> 01:07:39.169

Adam Cmejla, CFP®: you feel kind of like it's on like you're on drugs. Even then not that I would know what that feels like, but I would imagine that that's probably what it feels like to be like drugged up like. It's a weird high that you get just from holding your breath. What's interesting about it is that as you do that over and over again on the third or fourth rep, I would get to holding my breath for 4 min

443

01:07:39.700 --> 01:07:43.179

Adam Cmejla, CFP®: on the excel, which is just very weird, and then Wim Hof will say.

444

01:07:43.550 --> 01:07:46.530

Adam Cmejla, CFP®: after you're done with that exercise, go right away and take cold shower.

445

01:07:47.580 --> 01:07:53.840

Adam Cmejla, CFP®: That is a very, very weird sensation. Did you ever do any any breath exercises with the cold shower, or was it just a cold shower.

446

01:07:54.180 --> 01:07:58.190

Grant Bledsoe: No, but that might be the next psychotic thing that I try.

447

01:07:58.380 --> 01:08:06.460

Adam Cmejla, CFP®: I should mention. It did grow up in anchorage, Alaska. So I'm I'm just weird with cold weather.

448

01:08:07.420 --> 01:08:08.340

Adam Cmejla, CFP®: Yeah.

449

01:08:08.630 --> 01:08:16.389

yeah, I think one thing is awesome is that you know, you're able to come back and to really focus after

last year. And then the challenges that you have.

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01:08:16.470 --> 01:08:20.380

Allison Foulk: So I think a lot of people in the program. You know, we get emails.

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01:08:20.649 --> 01:08:34.930

Allison Foulk: People must apologize. You know what they're going through life circumstances? Why, they feel like they haven't hit the metrics or made the changes that they want to, you know. And so I appreciate you sharing that you've had a year growth following that. And that's just a part of

452

01:08:34.930 --> 01:08:52.819

Allison Foulk: you know, life and a part of being business owner, and you've been able to come back from that. So thank you for sharing that. That's great, and we all know what it's like. You. You immediately focus on what's like the minimum necessary stuff I've got to do to keep the clients happy and keep the practice running.

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01:08:52.859 --> 01:08:54.750

Grant Bledsoe: And then the rest of your focus is on.

454

01:08:55.350 --> 01:08:57.060

Grant Bledsoe: You know the the task of handwritten.

455

01:08:58.310 --> 01:08:59.090

Allison Foulk: Yeah.

456

01:08:59.819 --> 01:09:17.869

Allison Foulk: alright. Well, next and if that's insights we sent out Stephanie's article. That she writes for. Thank you. Letter to the year. So Adam is going to paraphrase this activity for us a bit. And then we are actually gonna take some time on this call.

457

01:09:17.870 --> 01:09:42.000

Adam Cmejla, CFP®: Thank you. Letter. So, Adam, do you kind of want to share your experience with it today?

458

01:09:42.000 --> 01:09:51.419

Adam Cmejla, CFP®: What you see on screen here writing the thank you. Letter to your year. An iteration of that, a derivative of that is also to write a, to write a thank you letter to your future self.

459

01:09:51.609 --> 01:09:59.569

Adam Cmejla, CFP®: right so to write a letter to yourself, of who you aspire to be in the future, what you aspire to accomplish in the future.

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01:10:00.070 --> 01:10:06.049

Adam Cmejla, CFP®: But we'll talk about the idea of writing the thank you. Letter to your year. This is

kind of going back to what Kim was saying.

461

01:10:06.410 --> 01:10:21.549

Adam Cmejla, CFP®: you know it's it. Sometimes it's difficult, or we don't really give ourselves credit for what we've accomplished until we actually sit down and measure. And the idea behind this. Thank you. Letter is that we're doing just that. We're giving you the time agency and space to

462

01:10:21.720 --> 01:10:37.349

Adam Cmejla, CFP®: take inventory over this year about the work that you've done, both in and out of your practice. the momentum that you've made, the rocks, that you've moved, the initiatives that you've started and the success right? Going back to that gain the gain that you have experienced

463

01:10:37.430 --> 01:10:57.890

Adam Cmejla, CFP®: by executing on a few things. One of the things that we hear with limitless all the time is like, oh, there's so much there's so much I can't do. All of it's like you don't have to do all of it. That's not the point. Our goal as as as coaches, and as a program is to give you. I keep using this metaphor right, or I use this better for all the time to give you the full, the full quiver of arrows to pull from.

464

01:10:58.240 --> 01:11:09.939

Adam Cmejla, CFP®: It's a matter of which one of those areas, or which one of those arrows, or which combination of those arrows are going to be the right combination to move you and your practice in the direction that you aspire to move.

465

01:11:10.180 --> 01:11:24.549

Adam Cmejla, CFP®: But if we continue to get into doing mode, and we don't take time to sit and reconcile what we actually accomplish up to this point and use that journey. Use that set of accomplishments to then guide our way forward.

466

01:11:25.790 --> 01:11:27.999

Adam Cmejla, CFP®: Best case scenario. You just kind of burn out

467

01:11:28.140 --> 01:11:30.500

Adam Cmejla, CFP®: and and get and get

468

01:11:30.510 --> 01:11:49.569

Adam Cmejla, CFP®: get just kind of in the work mode. Worst case scenario is, you become cynical about the work that you're doing because you feel overwhelmed, and you feel stressed, and that there's the the to do list is always getting longer and longer and longer without actually measuring the success that you've had along the way. So what we want you to do today with that kind of

469

01:11:49.740 --> 01:11:54.070

Adam Cmejla, CFP®: foundation and explanation context, if you will, around this idea

470

01:11:54.090 --> 01:12:08.630

Adam Cmejla, CFP®: is to take time, whether it be in your journal or whether it be on on your screen. Alison, we're doing breakouts. Correct, are we? Gonna no, we're not gonna do breakouts. We're just gonna do some. We're gonna give you some music to just

471

01:12:09.870 --> 01:12:21.579

Adam Cmejla, CFP®: be calm. No cold showers, no shock, no shock therapy here. Anything like that. We're just gonna put on some some gentle spa like music and give you

472

01:12:22.090 --> 01:12:32.499

Adam Cmejla, CFP®: a handful of minutes to just write a letter to yourself. And the thing about this letter as I would before I turned over to Alison to kind of turn the music on is.

473

01:12:33.260 --> 01:12:36.780

Adam Cmejla, CFP®: make sure that when you're writing it. You're you're

474

01:12:36.800 --> 01:12:40.430

Adam Cmejla, CFP®: doing it in a way that is going to be.

475

01:12:40.600 --> 01:12:45.920

Adam Cmejla, CFP®: You're writing it in a way that the future you is going to want to read

476

01:12:46.010 --> 01:13:12.129

Adam Cmejla, CFP®: right? So this is idea. We don't want you. Just write this and like, Oh, great! I did that exercise sort of wait. No, the goal here is to essentially create an artifact in your life, create something that is timestamped and something that you can go back and revisit again. And here's and and the reason my most beneficial reason for doing that is, whenever I find myself struggling in business about something that I'm working on right now, I'll go back to my journal and read a year, 18 months, 2 years ago.

477

01:13:12.280 --> 01:13:28.599

Adam Cmejla, CFP®: and read, what? What did I write to myself at that time? That was overwhelming, or seemingly impossible, or that I was struggling to execute on. And I have yet to find an example where that thing that I wrote about in the past was something that I was still tripped up on and still struggling with.

478

01:13:28.620 --> 01:13:33.299

Adam Cmejla, CFP®: So that's the that's the positive fuel that the present me then takes to say, well.

479

01:13:33.620 --> 01:13:41.209

Adam Cmejla, CFP®: shit the person that I was back then was struggling with that. And now I look at that, that's just standard operating procedures to business right now. So

480

01:13:41.300 --> 01:14:01.119

Adam Cmejla, CFP®: the same thing is gonna happen with what I'm working on right now. So write the letter in a way that the future you is going to want to come back and look at this so any questions before



we get started with breakout or not really breakout. Excuse me, but before we kind of. I don't wanna say per actually mute, but turn on music, and just kinda give you some of that space to write.

481

01:14:04.320 --> 01:14:05.160

Adam Cmejla, CFP®: No.

482

01:14:05.440 --> 01:14:14.390

Allison Foulk: okay. great. I will go ahead and start the music, and we'll give you. I don't know. Probably 7 and 7 to 8 min or so.

483

01:17:52.710 --> 01:17:53.890

You're

484

01:18:20.040 --> 01:18:21.100

Mmm.

485

01:18:57.860 --> 01:18:59.190

You're

486

01:19:11.680 --> 01:19:13.410

you.

487

01:19:27.440 --> 01:19:32.760

you. You're

488

01:20:43.640 --> 01:20:44.650

you're

489

01:20:52.850 --> 01:20:53.920

you're

490

01:21:47.050 --> 01:21:48.520

you

491

01:22:26.180 --> 01:22:34.269

Allison Foulk: okay. It's been about 8 min. Give me about 10 s to just finish up your thought. Here.

492

01:22:53.240 --> 01:22:55.720

Allison Foulk: Alright, Adam, I think you're on mute still

493

01:22:55.800 --> 01:23:02.670

Adam Cmejla, CFP®: doesn't say anybody else had that feeling like they just give themselves a mental



massage like I feel like, Oh, now, here's your glass of water right?

494

01:23:02.680 --> 01:23:04.159

Allison Foulk: Sit up slowly

495

01:23:04.450 --> 01:23:17.179

Adam Cmejla, CFP®: like take some time. Ill mean I'm serious. If you haven't done if you don't, if if this is the first time that you have done something like this. Hopefully, it's not because we talk about journaling and

496

01:23:17.220 --> 01:23:23.770

Adam Cmejla, CFP®: writing right there. There's that quote that I love, that I didn't know what I was thinking until I started writing.

497

01:23:24.150 --> 01:23:34.239

Adam Cmejla, CFP®: If this hasn't been something that has been part of your curriculum, the cadence to be determined right daily, Weekly, Monthly Quarterly. That's for you to decide

498

01:23:34.480 --> 01:23:38.749

Adam Cmejla, CFP®: hopefully. If this is the first time that you've done something like that, you found.

499

01:23:40.080 --> 01:23:53.209

Adam Cmejla, CFP®: I really do hope that you felt even a fraction of what I feel when I do that, even though I do it a fair amount. Was just going back and looking at it. When I wrote from September 20, seventh as I was writing this from December fourth, so

500

01:23:55.180 --> 01:24:00.020

Adam Cmejla, CFP®: keep keep the artifacts, keep the timeline. Keep the journey. It's so important.

501

01:24:01.850 --> 01:24:11.320

Adam Cmejla, CFP®: dear. 2023. I like that, Darren. Well done, dear. 2023. You suck. No, I'm kidding

502

01:24:11.400 --> 01:24:37.420

Allison Foulk: alright, awesome. Okay, so we will give you one or 2 more minutes if anybody wants to take the survey. I know we've had some calls, so we can draw our winner. While you may be doing that for those of you returning in 2024 I wanted to just take the opportunity to tell you a little bit about the Add-ons.

503

01:24:37.420 --> 01:25:00.460

Allison Foulk: So we have our coaching pass. Add on, which is essentially a quarterly call with one of our coaches you get to select from Stephanie Adam with, and Natalie will all be available, and then they will also offer personalized email support in addition to those coaching calls. So you can follow up with them if you need any support while you're implementing what you talked about on the call

504



01:25:00.840 --> 01:25:03.810

Allison Foulk: Adam's cohort meets monthly

505

01:25:03.910 --> 01:25:24.689

Allison Foulk: and he will be really talking about rolling up your sleeves, how to implement the same lesson that we learned on the coaching call. So his is essentially continuation of the coaching call with Steph, how he's implemented it in his practice, which is, gonna be really great. And in addition to that, he's holding space weekly for

506

01:25:24.690 --> 01:25:38.490

Allison Foulk: like one on one calls on a as needed basis. So if you're in his cohort, you have access to him. As you need it, you know. Say you need to talk to him once every 3 months or so. He'll have standing availability for you to be able to do that.

507

01:25:38.680 --> 01:25:47.160

Allison Foulk: The other add on, is our retreat workshops. I just wanna mention those because they're a bit of a pivot from what we've done in the past for retreat.

508

01:25:47.190 --> 01:25:53.209

Allison Foulk: Whether you're with us or not, you're totally welcome to attend those retreat workshops.

509

01:25:53.230 --> 01:26:16.799

Allison Foulk: So if you still want to continue to be a part of the limitless tribe get some support. We will be in Charlotte and Denver next year, and they will be one and a half day. Workshops 3 h time blocks per topic. So it's not just a 1 h lesson like we've done this year. It's really dive in, do the work, make some headway, go home with a plan. So we're really excited for the format of those.

510

01:26:17.010 --> 01:26:44.769

Allison Foulk: So if you have any questions about that, Adam actually is doing an office hours next Monday at 9 Am. Pacific time. If you need that zoom link. I think we put it in inbox. Maybe Katherine can check that for me real quick, but feel free to we did. Okay, thank you, Catherine. Feel free to come and ask him any questions. If you're considering that for next year it's just a 30 min. Open time. Block so you can come in and get any

511

01:26:44.770 --> 01:27:00.779

Allison Foulk: any of your questions answered about that so we're super looking forward to that, and we hope the ability you have this year to pick what really will make the most difference for you. It's helpful and kind of customizing your limitless plan for what you need.

512

01:27:01.010 --> 01:27:05.129

Adam. Is there anything you want to add on about your cohort?

513

01:27:05.630 --> 01:27:19.480

Adam Cmejla, CFP®: It is gonna be a Gsd cohort you can fill in the blank. Get? You know what done? I think the biggest thing that I want to impress upon people that are in the cohort is there's going to be a accountability and clarity are the 2



514

01:27:19.810 --> 01:27:24.690

Adam Cmejla, CFP®: for lack of better word core values that I want to bring to the

515

01:27:24.910 --> 01:27:36.869

Adam Cmejla, CFP®: cohort. Right? We hear we go through a lot of material in the in the program. But what I want members of the cohort to know, after going through the additional

516

01:27:36.870 --> 01:27:55.049

Adam Cmejla, CFP®: group session time, that we have, as well as any additional one to one time, that an advisor might have what I want to solve with the cohort was one of the more common things that I hear from advisors, which is essentially what they're saying. W. What do I do next? Like? Okay, I I've heard the lesson, and I see what you've done.

517

01:27:55.280 --> 01:28:04.989

Adam Cmejla, CFP®: I think this is what I should be like. But what's what's the next step? Where do what? What should I execute on here? That's what we're gonna bring to the cohort is clarity. It's like, Okay, here's your next step.

518

01:28:05.020 --> 01:28:06.490

Adam Cmejla, CFP®: and then some

519

01:28:07.010 --> 01:28:30.170

Adam Cmejla, CFP®: fun versions of of some accountability like we're going to publicly plant the flag in the sand and say, alright, now that you have clarity on what you're gonna do? When are you gonna have either it done, or the next best measurable step that you're gonna have executed on so collectively as a cohort, we will hold each other accountable and and have clarity on what we're gonna on. We'll reach and accomplish in our practices

520

01:28:32.100 --> 01:28:33.260

Allison Foulk: think bad.

521

01:28:33.640 --> 01:28:37.889

Allison Foulk: let's see. So then,

522

01:28:38.250 --> 01:28:48.979

Allison Foulk: I wanna give people one more second to finish their surveys. So I see Samantha is in her holiday sweater I am is anyone whose camera is off

523

01:28:49.170 --> 01:28:51.380

Allison Foulk: also rocking the holiday quarter.

524

01:28:52.120 --> 01:28:54.830

Allison Foulk: be it other ugly or cute.



525

01:28:55.980 --> 01:28:59.059

Allison Foulk: I feel like you usually have a holiday sweater on Jeff

526

01:29:00.160 --> 01:29:11.650

Jeffrey Dunn-Bernstein: instead. You're sitting there in the sunshine with your sunglasses on. I looked everywhere to pack my big Hanukkah sweater to Arizona, and I could not find it anywhere for you guys, I'm sorry.

527

01:29:11.840 --> 01:29:20.430

Yeah, it would be kind of ironic with the sunshine and the sun glasses sitting there. Okay? Well, you're muted to have yours today.

528

01:29:20.950 --> 01:29:25.370

Allison Foulk: Alright. Well, you win.

529

01:29:25.590 --> 01:29:43.989

Allison Foulk: Liz is going to be involved in our base camp breakthrough course next year as well, which is 6 weeks we're offering the members free, included in your enrollment of weekly support implementing our January summit topic.

530

01:29:43.990 --> 01:30:02.470

Allison Foulk: So with Natalie and Stephanie, will each take 2 weeks and be covering vision time and mindset. So that's going to be a really cool benefit for folks that we're we're doing next year. Kind of piloting this virtual course and offering it to any who any of our members next year with their enrollment.

531

01:30:03.710 --> 01:30:14.499

Allison Foulk: Okay, so, Katherine. can you please draw from the virtual space a winner for us from our end of your survey.

532

01:30:14.890 --> 01:30:23.119

Kathryn Waller: Okay, let's get our random number generator rolling. Okay? First one.

533

01:30:23.570 --> 01:30:27.010

Kathryn Waller: you ready. Lucky number 13.

534

01:30:27.490 --> 01:30:28.530

Allison Foulk: Oh.

535

01:30:28.790 --> 01:30:32.050

Kathryn Waller: all right. we've got

536

01:30:36.990 --> 01:30:38.530



Kathryn Waller: Julie Botoni.

537

01:30:39.360 --> 01:30:42.599

Julie Botoni: Oh, Julie, okay. Oh, wow!

538

01:30:43.440 --> 01:30:58.510

Allison Foulk: Okay, great. So you can let us know. And you can email attend coaching. If you want to attend a retreat workshop or join Adam's cohort next year.

539

01:30:58.830 --> 01:31:01.690

Allison Foulk: Yup, just let us know which one you would like.

540

01:31:01.920 --> 01:31:05.659

Allison Foulk: Fantastic. Thank you alright

541

01:31:05.990 --> 01:31:08.970

Kathryn Waller: and number 2.

542

01:31:09.700 --> 01:31:11.620

Kathryn Waller: We have 18.

543

01:31:15.840 --> 01:31:18.590

Kathryn Waller: Misha. Misha Marshall.

544

01:31:19.320 --> 01:31:22.439

Kathryn Waller: Micah. Thank you.

545

01:31:23.450 --> 01:31:24.740

Allison Foulk: Perfect.

546

01:31:24.780 --> 01:31:33.589

Allison Foulk: Okay, well, congrats Micah and Julie. We look forward to having you participate in one of those 2 next year. Thank you for taking your survey.

547

01:31:33.640 --> 01:31:41.269

Allison Foulk: Okay, I am. I think that's it. I'm gonna stop sharing screen. Did you find

548

01:31:41.420 --> 01:31:44.880

Allison Foulk: any better Christmas jokes.

549

01:31:45.390 --> 01:31:54.700

Adam Cmejla, CFP®: No, it was as bad as I crashed and burned in beginning. I'm not even gonna



subject. I'm not gonna go out like that. If this is our last scheduled call, I am not gonna go down

550

01:31:54.710 --> 01:32:05.099

Adam Cmejla, CFP®: like a flaming pile of you know what. So I'm going to recuse myself from any further Christmas jokes. I'm gonna go out on a high note here. And as best of a high note as I can.

551

01:32:05.750 --> 01:32:08.850

Allison Foulk: Okay, any members have one. They really want to share.

552

01:32:12.030 --> 01:32:17.069

Allison Foulk: I feel like Stephanie usually has a really good mild

553

01:32:17.290 --> 01:32:24.730

Adam Cmejla, CFP®: she has. She's had a couple of them in the past, and you can stop the recording now and then, I'll tell you.

554

01:32:26.410 --> 01:32:28.260

Yes, exactly, Liz.

555

01:32:28.450 --> 01:32:32.329

Allison Foulk: Okay, well, Adam, and I'll let you wrap this up today.

556

01:32:33.940 --> 01:32:35.719

Adam Cmejla, CFP®: Thank you.

557

01:32:36.120 --> 01:33:02.310

Adam Cmejla, CFP®: Everybody sincerely in, in genuinely and authentically, this is a joy and a privilege for me to sit in the spot and to work with all of you throughout this year. In, in all the different capacities that I've been involved in each of your lives, whether it be individually or just, in the content that we put out there. It's been an amazing journey myself. To go through that limitless as a participant and then to transition into a coaching role has been

558

01:33:02.500 --> 01:33:04.680

Adam Cmejla, CFP®: awesome selfishly.

559

01:33:05.040 --> 01:33:30.259

Adam Cmejla, CFP®: and thank you for the opportunity and privilege of sitting in that role and providing what I assume and hope to be an incredible amount of value for you all as as members. So, even though it is the last call of the year. Putting on the business hat, you still have a twelfth of the year left, right? So there's still 26 days, 27 days left to get to G Sd. Right to get stuff done

560

01:33:31.030 --> 01:33:44.299

Adam Cmejla, CFP®: holidays, etc. Etc. But we are here all that to say. We are still here throughout the rest of the year. We have office hours coming up again. I believe. Correct, Allison. We have one more



session

561

01:33:44.500 --> 01:33:56.580

Adam Cmejla, CFP®: office office hours today, and then practice office hours next week with coach next week.

562

01:33:56.600 --> 01:34:12.460

Adam Cmejla, CFP®: sessions. If you will left between now and the year now, and the end of the year. Try is still alive and well. Post your questions as we're coming up on your end and try, will be happy to jump in and and answer those questions again. I love, I love, love, love, love, love, love, love, try because it allows us to all learn in public.

563

01:34:12.480 --> 01:34:28.379

Adam Cmejla, CFP®: I love the one on one calls that we have. I will end every call that I have with with with advisors and a one on one, because inevitably, I'll get a variation on a well. So can I follow up with you if I have additional questions like, yeah, just tag me and try because we can all learn together, because what you're what you're going through

564

01:34:28.380 --> 01:34:45.039

Adam Cmejla, CFP®: is likely going to be a derivative of what someone else has gone through previously that could then maybe swoop in and comment, or they're going through as well. Just haven't reached out to have that one on one time with me so or or Stephanie, or Liz, or Natalie, or whoever else you might have had the one on one with so

565

01:34:45.340 --> 01:35:00.990

Adam Cmejla, CFP®: hit us up on tribe. Alison, how kind of closing up housekeeping for those that while we would love and hope that every single one of you will be back in some capacity next year as an advisor or as as a member

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01:35:00.990 --> 01:35:16.170

Adam Cmejla, CFP®: for those of you that aren't going to be around. When is the last? Do we know exactly, or maybe just a ballpark of when essentially their membership will lapse and they'll lose access to tribe library things like that.

567

01:35:16.220 --> 01:35:44.440

Allison Foulk: Yes, it will be about December twentieth that will shut things down so we can start onboarding everybody for next year and the week before Christmas. So if you do, you know, if you want to download anything from your mastermind groups on, try if you have any resources, just be sure to grab those before then, so you can continue to do your work. Awesome, awesome. Thank you. Appreciate the appreciate the clarity on the date. So again, thank you everybody we appreciate, we appreciate you. We appreciate your commitment to the program.

568

01:35:44.530 --> 01:35:56.220

Adam Cmejla, CFP®: enjoy the holiday season, make it worth it right. This is all in service of something more than just a paycheck, more than just a business. So make sure that we're that we're doing it in service of those to in, in service to those that we love and care about.



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01:35:56.280 --> 01:36:03.710

Adam Cmejla, CFP®: Enjoy it have a safe holiday season. And again, hopefully, we'll see all of you, or at least a good portion of you next year in 2024.

