

WELCOME

DECEMBER Practice Development COACHING CALL & PROGRAM WRAP

LIMITLESS 2024

Dec. 11: Cohort Q&A: Ask Adam Anything (9:00 am PT)

Dec. 11: Final Practice Office Hours & Mastermind

Dec. 15: Referral Credits Deadline

END OF YEAR SURVEY

Take your survey or Allison will be sad.

FOR TODAY'S QUESTIONS

Please use Zoom Q&A

on your phone or second screen

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DECEMBER COACHING CALL



Coach Adam
Cohort

or

Live Retreat
Workshop



NUGGETS OF Wisdom

LIMITLESS



Best Reader Award:
DAREN CHAMBLEE

SUCCESS Spotlights



Samantha Blanchette

CLIENT WIN

Our AUM is up about \$15 Million vs last year

MINDSET WIN

Limitless has really helped me break through my Imposter Syndrome and become myself and thrive with clients!

LIMITLESS LIFE WIN

Through Limitless I have found my authenticity and excitement again. My Life Win is really finding confidence outside of the office.

VALUE WIN

We are working on re-structuring our service model to offer the best service to our clients, and we have implemented Surge weeks

MARKETING WIN

All growth has been organic and word of mouth from current clients! 2024 Webinars are on my list!

SUCCESS Spotlights



Kim Abmeyer

CLIENT WIN

Developing a rinse-and-repeat presentation for professional women to ensure their financial success.

MINDSET WIN

Being more intentional with building everything: firm structure, roles, pitchbook, brand message, client experience & my time!

LIMITLESS LIFE WIN

I started following the concepts in Traction, with ROCKS to keep us on track & accountable.

VALUE WIN

I hired an advisor to lead our planning services

Being more intentional with COIs and how we engage them

MARKETING WIN

Hired a Practice Manager who Frees me to be Above the Line.

Revamping our website and creating new prospect deliverables

SUCCESS Spotlights



Grant Bledsoe

CLIENT WIN

MINDSET WIN

Settled into a morning routine that works great for me

LIMITLESS LIFE WIN

Return to normalcy after a challenging 2022

VALUE WIN

Standardized our service model and value adds

MARKETING WIN

\$68,000 of new recurring revenue added thus far in Q4






BIG IDEA:

Write a Thank You Letter to your Year!

- ✓ Extract Lessons
- ✓ Win or Learn
- ✓ Cultivate Awareness
- ✓ Gratitude Increases Happiness



Extracting lessons from the year ensures you never fail, instead you either win or learn

December 7, 2020 by Stephanie Hogan     

This was far from a typical year, so it's fitting this not be a typical post. This *last column* of 2020 is as much about my learning as yours.

I'm just back from my annual 'Reflection Retreat,' three days of solitude during which I rested, recharged and reflected on 2020. Before finalizing plans for the coming year, I want to squeeze all the learning from this one. Otherwise, all misses are sunk costs. Taking time to extract your lessons from the year has real ROI because it ensures that you never fail, you either win or you learn.

[More: [Year in review: Pandemic edition](#)]

In this last column of a daunting year, I'm sharing the exercise I used to capstone this year — I wrote a thank you letter to 2020. It may sound silly, but I assure you it can produce striking insights.

You begin by listing out every person and situation that challenged you this year. When candid, this can take a few pages. Next, go down the list giving serious thought to what you learned from each item, only moving to the next item once you've noted all the learnings for which you can be genuinely grateful.

Once done, you write out 'Dear 2020, this year I'm grateful for...' and you write out a letter thanking the year for each of the valuable lessons you learned and how it will help you experience greater success and satisfaction in the year ahead.

You conclude the letter with "In 2021, I'll reap the full return from these lessons by..." and list how you intend to use the learning and what actions you will take as a result in 2021.

For the macho among you, [Joeko Willink](#) is a massive fan of gratitude journaling. For the philosophical and the profit seekers, [Harvard happiness researcher Shawn Achor](#) notes working from a positive state increases productivity 31%, boosts sales 37% and improves every other business outcome measured.



Survey Results & Winners....

- Scan the QR code to take your 2023 End-of-Year Survey
- Feedback is our friend! Share your thoughts with the team.
- *Live Prize Drawing! Winners may choose:*



Coach Adam
Cohort

or

Live Retreat
Workshop





LIMITLESS Q&A