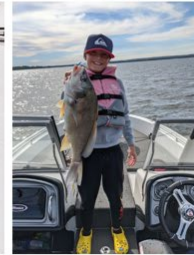


JED'S LIMITLESS LIFE

My Big Why

To simplify my practice through insanely simple and effective processes so that I can create time, opportunities, and great experiences for myself and the people in my life.



\$1MM REVENUE

80 DAYS 000

32 HOUR WEEKS

60% EBOC

80 IDEAL CLIENTS

MISSION

OUR WHY

The enduring reason for the company's work

To provide our clients with a goals-based financial planning experience unlike anything they have ever seen.

VISION

OUR WHERE

Your desired future state, what you envision for the firm

To build a \$1,000,000 lifestyle practice that serves 250 homes, generates 60% EBOC and opens up unique experiences and prosperity for owners, clients and the team.

VALUES

OUR WHAT

The beliefs and behaviors that govern your culture and decisions

- Conviction in the Firm's Mission & Vision
- Do good work
- Growth Mindset (CANI)
- We are the benchmark to which all other firms compare themselves
- Our client experience *IS* our marketing
- Kindness (like reuniting with a long lost friend)
- Accountability
- Do the MOST right thing
- Everyone leaves with their dignity

3 YEAR VISION

Top 3 Priorities for the year



**Implement Surge
Meetings**



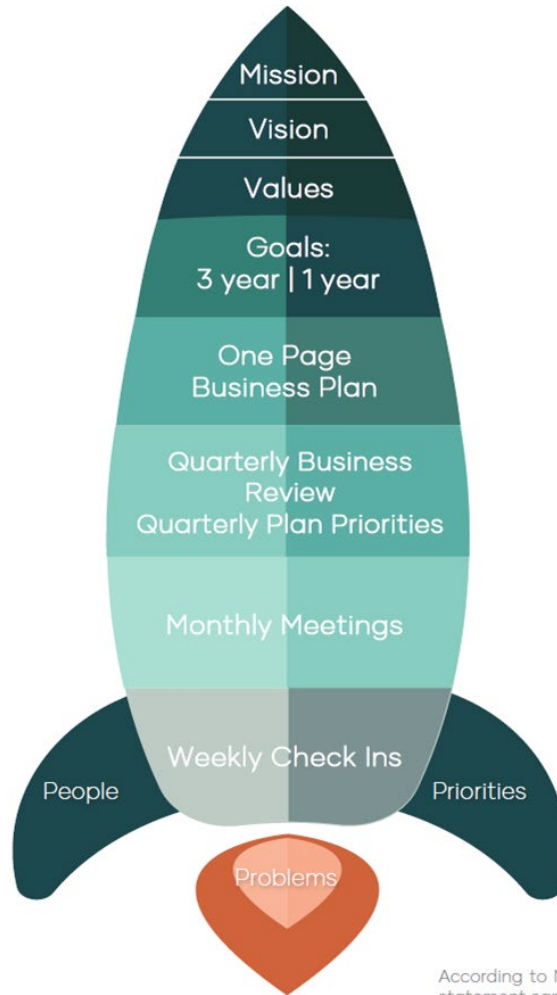
**Define Who We Serve
Best & A Service Model
For Doing So**



**Start Using
1- Page Plans**

	Current (YE 2021)	1-Year Goal (YE 2022)	3-Year Goal (YE 2024)	What Will It Take?
Revenue				<ul style="list-style-type: none"> -Sell off-profile clients -Sell (most) clients being serviced by other advisors -Develop & Focus on a niche
AUM				<ul style="list-style-type: none"> -Grow Jed's client base with ideal clients -Have other work off-niche clients (or sell)
Avg Rev/Client				<ul style="list-style-type: none"> -Trim unprofitable clients -Nurture and duplicate T1's -Max of 100 'other' clients
# of Days Off	20	70 (Summer Friday's & Ski Bees)	80	<ul style="list-style-type: none"> -Surge Meetings -Refine/Define Service Model -Clear processes that team uses and understands
Hours Per Week	40+	36	32	-As above
# of Ideal Clients (\$5,000 or \$2,500 + growing/yr)	48 (Total 600)	60 (Total 350)	80 (Total 250)	<ul style="list-style-type: none"> -Wow service model -Deliver massive value client meetings (and in between) -1-page plan/Planning First -Referrals: Our client experience IS our marketing! -Develop a marketing plan

THE LIMITLESS LAUNCH PROCESS



CLARITY
your what and why

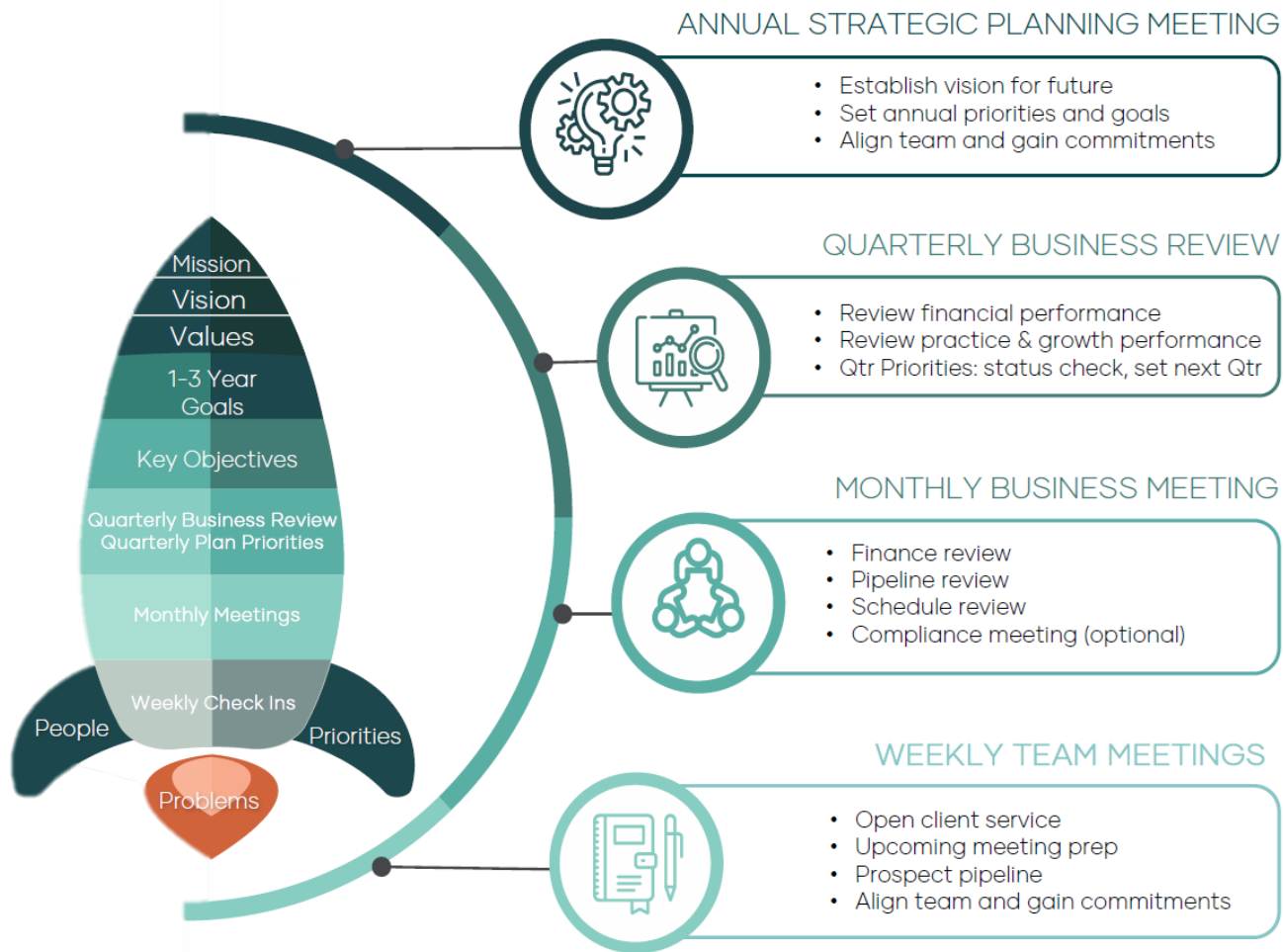


TRANSPARENCY
view on plans and progress



ACCOUNTABILITY
ownership of results

According to Medley (1992) and Wilson (1992), the existence of a detailed mission statement can lead to a 50% increase in the effectiveness of the company.



3-YEAR GOALS

\$1MM REVENUE + 80 DAYS OFF

1-YEAR GOALS

INCREASE RECURRING REVENUE BY \$50,000

SYSTEMATIZE CLIENT SERVICE

TAKE 70 DAYS OFF

KEY OBJECTIVES

BE REFERABLE

MARKET TO IDEAL CLIENTS

60% EBOC

DEFINE SERVICE MODEL

ARTICULATE VALUE

DELIVER MASSIVE VALUE TO IDEAL CLIENTS

MAXIMIZE TIME

SELL OFF-PROFILE CLIENTS

CREATE CAPACITY

QUARTERLY PRIORITIES

Q 1	<ul style="list-style-type: none"> REVIEW INC/EXP REPORT TEAM BONUS 	<ul style="list-style-type: none"> REVIEW MEETING AGENDA SURGE MEETINGS 	<ul style="list-style-type: none"> EDUCATION PIECE CHOSEN MEETING F/U PACKAGE 	<ul style="list-style-type: none"> IMPLEMENT 1-PAGE PLAN 	<ul style="list-style-type: none"> ANNUAL CALENDAR TIME BLOCKING 	<ul style="list-style-type: none"> COMPILE CLIENTS TO SELL SELL CLIENTS to FSC 	<ul style="list-style-type: none"> QUIT COMMITTEES QUIT BOOKCLUB END INTERNSHIPS 	
Q 2	<ul style="list-style-type: none"> REVIEW INC/EXP REPORT TEAM BONUS 	<ul style="list-style-type: none"> ASSESS SURGE 			<ul style="list-style-type: none"> SANEBOX FOR EMAIL EMAIL 3/DAY 30-MINS 	<ul style="list-style-type: none"> SELL 2nd BATCH OF CLIENTS TO FSC 	<ul style="list-style-type: none"> NO MORE WEEKENDS – NO EXCEPTIONS!!! 	
Q 3	<ul style="list-style-type: none"> CLIENT COMFORT LETTER CLIENT VIDEO SERIES(?) 	<ul style="list-style-type: none"> CHOOSE A NICHE BUILD MARKETING PLAN 	<ul style="list-style-type: none"> REVIEW INC/EXP REPORT TEAM BONUS 	<ul style="list-style-type: none"> DEFINE TIERS COMMUNICATE EXPECTATIONS TO CLIENTS 	<ul style="list-style-type: none"> DETERMINE HOW TO DEMONSTRATE VALUE 	<ul style="list-style-type: none"> REFINE PLANNING FIRST DELIVERABLES 	<ul style="list-style-type: none"> SET TIMES FOR SIGNING & QUESTIONS 	<ul style="list-style-type: none"> ORGANIZE ADMIN PROCESS ADMIN TIME BLOCKS
Q 4	<ul style="list-style-type: none"> BOOK OF THE YEAR (NOV) 				<ul style="list-style-type: none"> DELEGATE EMAIL 2/DAY ONLY 	<ul style="list-style-type: none"> ASSESS ADDT'L CLIENTS TO BE SOLD 		

Productivity Mindset



LIMITLESS

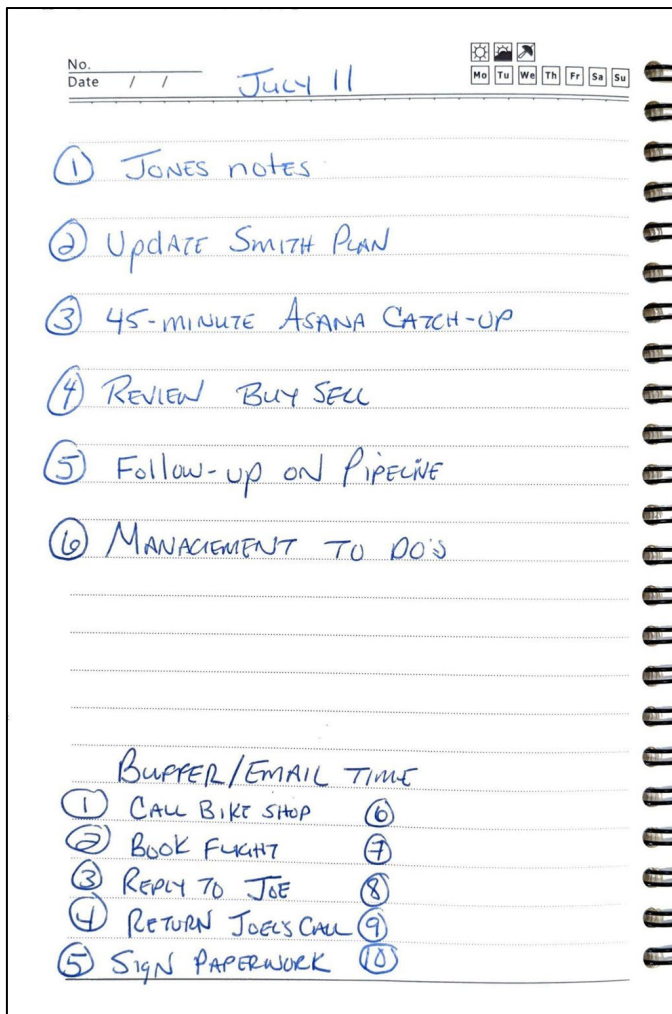


TAKE CONTROL OF YOUR TIME

MORNING ROUTINE

5:30 AM	Daily Stoic Reading, 20 Minutes Meditation
6:00 AM	Exercise
7:00 AM	Coffee & Breakfast
7:30 AM	Worksheet with Kids
8:00 AM	Shower & Dress

Ivy Lee / Getting Things Done Inspired Daily To Do List



- ① JONES notes
- ② UPDATE SMITH PLAN
- ③ 45-MINUTE ASANA CATCH-UP
- ④ REVIEW BUY SELL
- ⑤ Follow-up on PIPELINE
- ⑥ MANAGEMENT TO DO'S

Must Do's

Things that encourage distraction or procrastination to be addressed during buffer/email time

- BUFFER/EMAIL TIME
- ① CALL BIKE SHOP ⑥
 - ② BOOK FLIGHT ⑦
 - ③ REPLY TO JOE ⑧
 - ④ RETURN JOEL'S CALL ⑨
 - ⑤ SIGN PAPERWORK ⑩

Rockwater Annual Calendar Template

January 2022						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
17	18	19	20	21	22	
23	24	25	26	27	28	29
30	31					

February 2022						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28					

March 2022						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

April 2022						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

May 2022						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

June 2022						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

Calendar Key	
OFFICE CLOSED	
CLIENT MEETINGS	
MEETINGS PREP/FOLLOW-UP/SALES & CALL INS	
JED OOO	

July 2022						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

August 2022						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

September 2022						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Date	Holiday
Jan 1	New Year's Day
Feb 21	Family Day
May 23	Victoria Day
Apr 15	Good Friday
Jul 1	Canada Day
Aug 1	Civic Holiday
Sep 5	Labor Day
Oct 10	Thanksgiving Day
Nov 11	Veterans Day
Dec 25	Christmas

October 2022						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

November 2022						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

December 2022						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Date	Conferences
Mar. 28-28	Limitless Retreat
May 1-4	CALU
Jun. 27-29	MDRT
Sep 19-22	Limitless Retreat
Oct. 19-22	TOT

Surge Week

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	
	Prep & Management & Coaching	Client: Meetings, Plans & Promises (P&P)	Client: Meetings, Plans & Promises (P&P)	Client: Meetings, Plans & Promises (P&P)	Plans & Promises Catch-up OR Out of Office	
7:00						7:00
7:30						7:30
8:00						8:00
8:30						8:30
9:00	File Prep	Daily Prep & Email	Daily Prep & Email	Daily Prep & Email	Email & Asana	9:00
9:30		Client Meeting	Client Meeting	Client Meeting	Buffer (Notes/P&P)	9:30
10:00						10:00
10:30		Notes Plans & Promises	Notes Plans & Promises	Notes Plans & Promises	File Prep	10:30
11:00	Management To Do's	Client Meeting	Client Meeting	Client Meeting		11:00
11:30	Email & Buffer				Email & Asana	11:30
12:00	Lunch	Lunch	Lunch	Lunch	Lunch	12:00
12:30						12:30
1:00	Limitless Work/Sessions	Email & Buffer	Email & Buffer	Email & Buffer		1:00
1:30		Client Meeting	Client Meeting	Client Meeting	OOO or Buffer (Notes/P&P)	1:30
2:00						2:00
2:30		Notes Plans & Promises	Notes Plans & Promises	Notes Plans & Promises		2:30
3:00		Client Meeting	Client Meeting	Client Meeting	Email & Asana	3:00
3:30	Email & Buffer				OOO or Buffer (Notes/P&P)	3:30
4:00	File Prep & Management	Notes Plans & Promises	Notes Plans & Promises	Notes Plans & Promises		4:00
4:30	To Do's Catch Up	Email & Buffer	Email - Buffer (Notes/P&P)	Email - Buffer (Notes/P&P)		4:30
5:00						5:00

Non - Surge Week - (Appointments only if needed for sales or follow - up)

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	
	Prep & Management & Coaching	Plans & Promises and/or Follow-up/Sales Meetings	Plans & Promises and/or Follow-up/Sales Meetings	Plans & Promises and/or Follow-up/Sales Meetings	Plans & Promises Catch-up OR Out of Office	
7:00						7:00
7:30					**Only if needed	7:30
8:00					Goal of 30 days OOO	8:00
8:30						8:30
9:00	File Prep	Email & Buffer	Email & Buffer	Email & Buffer	Email & Buffer	9:00
9:30		Buffer (Notes/P&P)	Buffer (Notes/P&P)	Buffer (Notes/P&P)	Buffer (Notes/P&P)	9:30
10:00						10:00
10:30		Client Meeting: Follow-Up	Client Meeting: Follow-Up			10:30
11:00	Management To Do's	OR Buffer (Notes/P&P)	OR Buffer (Notes/P&P)			11:00
11:30	Email & Buffer	Email & Buffer	Email & Buffer	Email & Buffer	Email & Buffer	11:30
12:00	Lunch	Lunch	Lunch	Lunch	OOO	12:00
12:30						12:30
1:00	Limitless Work/Sessions	Buffer (Notes/P&P)	Buffer (Notes/P&P)	Buffer (Notes/P&P)		1:00
1:30		Client Meeting: Follow-Up	Client Meeting: Follow-Up	File Prep		1:30
2:00		OR Buffer (Notes/P&P)	OR Buffer (Notes/P&P)			2:00
2:30		Email & Buffer	Email & Buffer	Email & Buffer		2:30
3:00		Buffer (Notes/P&P)	Buffer (Notes/P&P)	Buffer (Notes/P&P)		3:00
3:30	Email & Buffer					3:30
4:00	File Prep & Management					4:00
4:30	To Do's Catch Up	Email & Buffer	Email & Buffer	Email & Buffer		4:30
5:00						5:00