

# PERFORMANCE

PLAYBOOK VIRTUAL RETREAT

VIRTUAL RETREAT

JANUARY 23, 2023



LIMITLESS ADVISOR



LET'S TALK ABOUT...



# NAVIGATING YOUR FIRST RETREAT

The screenshot shows the Limitless homepage. At the top, there is a navigation bar with the Limitless logo on the left and four tabs: Home, Schedule, Community (circled in red), and More. On the right side of the navigation bar are icons for a calendar, notifications, chat, and a user profile. Below the navigation bar is a large hero image of a person skiing. Underneath the image, the text reads "Welcome, Allison, to Performance Playbook Virtual Retreat!". Below this, there is a "Featured Sessions" section with three cards. Each card shows a time slot, date, and session title. The first card is "Performance Playbook Welcome" (9:30 AM - 9:45 AM MST, Monday, January 23). The second card is "Performance Playbook Overview & My Vision Workshop" (12:00 PM - 2:00 PM MST, Monday, January 23). The third card is "My Time & Accountability Workshop" (2:15 PM - 3:45 PM MST, Monday, January 23). To the right of these cards is an "Event Details" section with a thumbnail image and the text "2023 Performance Playbook Virtual Retreat" and "January 23, 2023".

The screenshot shows the event page for "Performance Playbook Overview & My Vision Workshop". At the top, there is a navigation bar with the Limitless logo on the left and four tabs: Home, Schedule, Community, and More. On the right side of the navigation bar are icons for a calendar, notifications, chat, and a user profile. Below the navigation bar is a "Polls" section with a "Create question" button. The main content area features the event title "Performance Playbook Overview & My Vision Workshop" and the date "Monday, January 23 at 12:00 PM-2:00 PM MST". Below the date is a "Join as host" button. The text describes the session: "Stephanie dives into the 4 remaining base camp lessons in a 30-minute overview, highlighting the most important principles and practices in Your Vision for Success, My Model Practice, Action & Accountability & Taking Control of Your Time. Coaches Adam and Lauren will then dive into 'show". Below the text is a "Speakers (3)" section with three cards for Stephanie Bogan (Chief Possibility Officer), Adam Omeja (Founder, International Dynamics & Wealth Management), and Lauren Kaufman (Practice Coach, Limitless Advisor). Below the speakers is a "Session Content" section (circled in red) with a "Files (4)" list. The files are: "My-Model-Practice-Activity" (101 KB), "Mapping Your Business Vision" (223 KB), "2023.01.23 \_BreakoutInstructions" (99 KB), and "1-Page Business Plan" (3 MB). On the right side of the page, there are four icons circled in red: Chat, Q&A, Polls, and Surveys.



# PERFORMANCE

PLAYBOOK VIRTUAL RETREAT

VIRTUAL RETREAT

JANUARY 23, 2023



LIMITLESS ADVISOR



Virg Cristobal (Class of 2020)  
RELOCATED HIS FAMILY TO PHILLIPINES



Brian Voss (Class of 2022)  
QUIET KICK-ASSERY

**Brian Voss** ▾

**Brian Voss** 10:05 AM  
Steph,  
Happy New Year! Though I have been quiet, I have been busy. It may be hard to tell because I haven't been actively involved with Limitless, but I've made huge progress. Last year I was so busy DOING, I didn't take the time to write about it or share my work.

2022 was a crazy year. I joined Limitless. The two advisors that I work with retired in March. That meant we went from 3 advisors to 1 and didn't drop any clients. On top of that we moved offices at the end of the year.

Because of Limitless and because of the focus it provided, I was able to deliver great results! Thanks to "taking control of my time" and "Surge" meetings, I was able to conduct 410 client meetings last year. The goal is to dramatically lower that number in 2023, but I felt I had to do that last year to ensure a smooth transition.

More importantly, I gained total clarity on who I want to serve and how I want to serve them.

I am now exclusively focused on working with clients who are within 5 years of retirement or retired. I help them to Simplify their money 2) Create an income they can't outlive and 3) Minimize their taxes over their lives.

With that focus, I have been able to tailor my tools and services.

Every relationship now has:  
 Asset Map to give them a complete  
 Riskalyze to provide a "high level" re  
 Income Dashboard and Guardrails (B  
 Holistiplan for Tax Planning  
 A One Page Financial Plan to summariz



**I Like Numbers - Life in Decades and Summary of Changes Implemented Because of Limitless Work**



**Christy Raines**  
Mountain Mom

11 days ago

(Christy here with what feels like my annual "Year Review" post for Limitless --)

# LIMITLESS

## PROGRAM GUIDE

CRUSH YOUR CLIMB



LIMITLESS

### YOUR GUIDE MAP

LEARNING PATHS	TRAILHEAD LESSONS	Goal Impact	Goal Impact	ADVANCED LESSONS	Goal Impact	Goal Impact
Market Mastery	The Science of Success	<input type="checkbox"/>	<input type="checkbox"/>	Self-Talk for Success Relationship to Money Overcoming Overwhelm Creating Change	<input type="checkbox"/>	<input type="checkbox"/>
Business Planning	Your Vision for Success My Model Practice Action and Accountability	<input type="checkbox"/>	<input type="checkbox"/>	Strategic Planning	<input type="checkbox"/>	<input type="checkbox"/>
Taking Control of Your Time	Take Control of Your Time Action and Accountability	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Delivering Your Value	No Stress Prospect Process Amazing First Meeting One-Page Financial Plan Model Client Meetings Client Onboarding 5-Star Service Model	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
School of Advice	One-Page Financial Plan Amazing First Meeting	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Delivering Deeper Value	Creating Your Client Service Model 5-Star Service Model Client Meeting Surges Seating and Sharing Fees Finding Your Fee Model No Stress Sales Process Communicating Your Value Nailing Your Niche Finding Your Fee Model Telling Your Story	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Nailing Your Niche	Nailing Your Niche	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>

### LIMITLESS PROGRAM MAP



### PERFORMANCE PLAYBOOK RETREAT

CONTAINS THESE LEARNING PATHS: MINDSET MASTERY, BUSINESS PLANNING, TAKING CONTROL OF YOUR TIME

**TRAILHEAD LESSON**  
**SCIENCE OF SUCCESS**  
Master your mindset to master anything.

**KEY ACTIONS:** As you move through each lesson in this guide, complete these action items to progress along the path to your Limitless Practice.

- Read the "7 Mindsets of Success Guidebook" and use the "7 Mindsets of Success Activity" worksheet to evaluate any limiting beliefs and up-level your current mindset.
- Use the "Above the Line - Task Transition" worksheet to transition away from energy-draining activities.
- Begin using the "Success Shifter" to build habits that create high-performance happiness in work and life.

**DESIRED OUTCOMES**  
Get clear on how mindset impacts your work, wealth and well-being; Gain clarity on what's holding you back and strategies to shift your mindset into a more consistent success state.

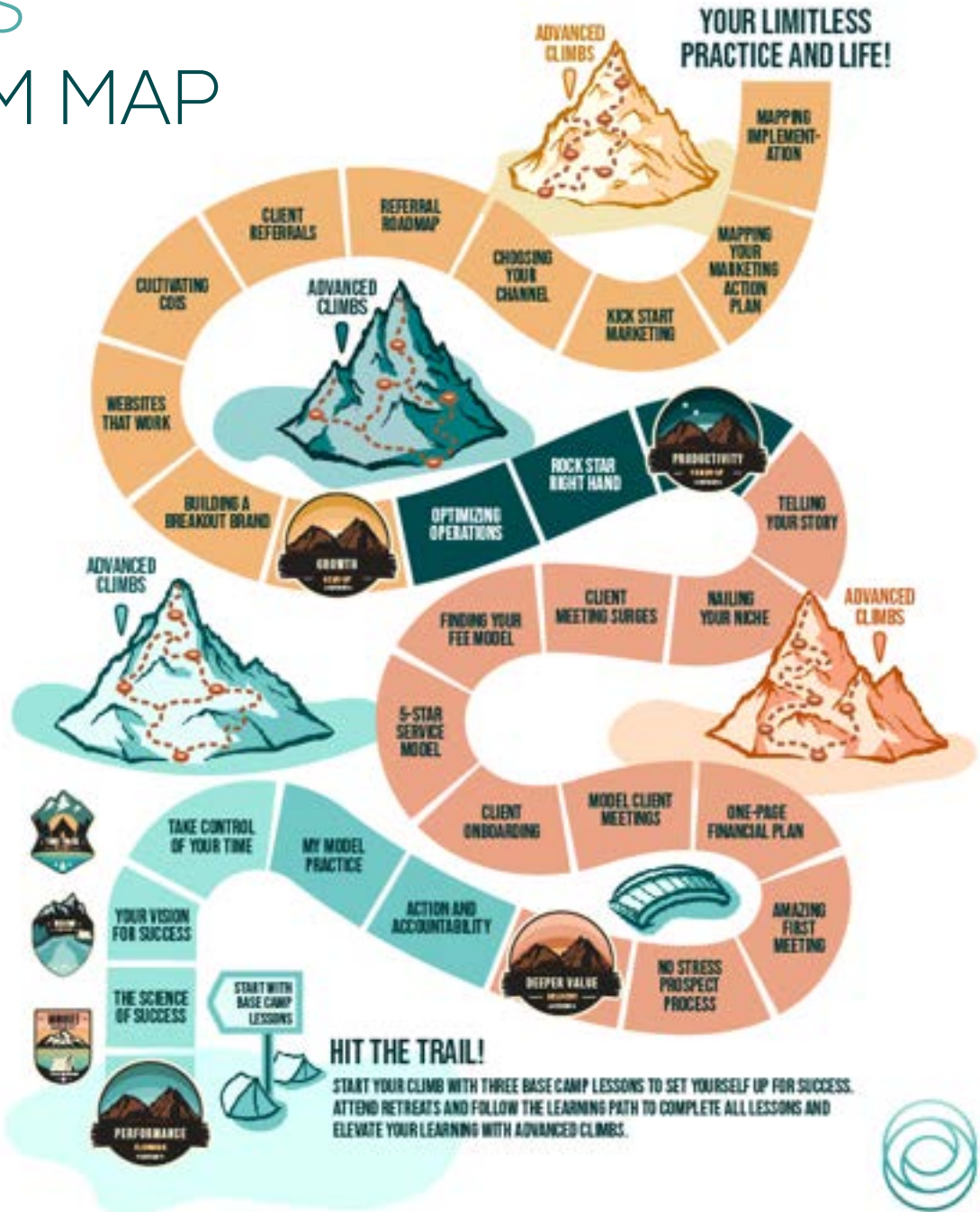
**LESSON RESOURCES**  
7 Mindsets of Success Guidebook  
Shift Your Thinking Workbook  
5 Freedom of Limitless Advisers  
7 Mindsets of Success Activity  
Success Shifter  
Above the Line - Task Transition  
My Limitless Life  
Building Better Beliefs Workbook  
Starting Today, I WILL... Activity

**READY FOR A CHALLENGE?**  
Reach new heights with these next-level lessons:

- Self-Talk for Success
- Relationship to Money
- Overcoming Overwhelm
- Creating Change

THIS PROGRAM GUIDE WILL BE YOUR COURSE HANDBOOK AND TRAINING PLAN

# LIMITLESS PROGRAM MAP



## START WITH BASE CAMPS

Set yourself up for success



## FOLLOW THE LIMITLESS LEARNING PATH

Complete the Trailhead Lessons path to create your Limitless practice!



## TAKE ADVANCED CLIMBS TO ELEVATE YOUR SUCCESS

Tackle specialized topics to go deeper when you're ready





## BASE CAMP LESSONS SET YOU UP FOR SUCCESS

## SUCCESS CLIMBS TO ACCELERATE YOUR SUCCESS



MINDSET  
MASTERY

MY MODEL  
PRACTICE

TAKE BACK  
YOUR TIME

TRUSTED  
ADVISOR

DEFINE  
YOUR VALUE

COMMUNICATE  
YOUR VALUE

STAFF FOR  
SUCCESS

OPTIMIZE  
SPECIALIZED  
SYSTEMS

FIND YOUR  
GROWTH  
GROOVE

SCIENCE OF  
SUCCESS

VISION FOR  
SUCCESS

TIME MODELS

ONE PAGE PLAN

NAIL YOUR NICHE

TELL YOUR STORY

ROCK STAR  
RIGHT HAND

OPTIMIZE  
OPERATIONS

CLIENT/COI  
REFERRALS

SELF-TALK FOR  
SUCCESS

MY MODEL  
PRACTICE

TIME MANAGEMENT

NO STRESS SALES  
PROCESS

TELLING YOUR  
STORY

NO STRESS  
SALES PROCESS

HIRING & TRAINING

KEY BUSINESS  
SYSTEMS

WEBSITES THAT  
WORK

OVERCOMING  
OVERWHELM

ACTION &  
ACCOUNTABILITY

CLIENT MEETING  
SURGES

MODEL MEETINGS

CLIENT SERVICE  
MODELS

CLIENT SERVICE  
MODELS

MANAGING &  
REWARDING

CLIENT SERVICE  
MODEL

1-PG MARKETING  
PLAN

# LIMITLESS Coaching Path


BASE CAMP LESSONS  
Set Yourself Up for Success

MINDSET      VISION      TIME




The 'BASE CAMP LESSONS' section contains three mountain-themed icons. The first is a shield-shaped icon with a mountain and a tent, labeled 'MINDSET BASE CAMP' and 'IT ALL BEGINS HERE'. The second is a mountain range icon labeled 'VISION'. The third is a mountain range icon with a tent and a trail, labeled 'TIME TRACK' and 'BIG DREAMS'.

CLIENT MODEL




The 'CLIENT MODEL' section features a central icon of a person climbing a rope, labeled 'CLIENT SERVICES - CLIMB'.

ROCK STAR  
STAFFING



STAFFING



OPERATIONS

The 'STAFFING' and 'OPERATIONS' sections are connected by a dotted line. The 'STAFFING' section has an icon of a person climbing a rock, labeled 'ROCK STAR' and 'STAFFING'. The 'OPERATIONS' section has an icon of a mountain range at sunset, labeled 'OPERATIONS OVERLOOK'.

GROWTH



The 'GROWTH' section features an icon of a person hiking, labeled 'GROWTH - HIKE'.



The 'PERFORMANCE' section features an icon of a mountain range, labeled 'PERFORMANCE PLAYBOOK'.



The 'DEEPER VALUE' section features an icon of a mountain range, labeled 'DEEPER VALUE DELIVERY'.



The 'PRODUCTIVITY' section features an icon of a mountain range, labeled 'PRODUCTIVITY POWER-UP'.



The 'GROWTH' section features an icon of a mountain range, labeled 'GROWTH GEAR-UP'.

# 2023 RETREATS



JANUARY 23  
Performance  
Retreat



MARCH 6-8  
Lifestyle Retreat

MARCH 9  
Mastermind  
Meet Up

MARCH 9-10  
Leaders Retreat



MAY 18-19  
Leaders Retreat



JUNE 12  
Productivity  
Retreat



AUGUST 21-23  
Growth Retreat

August 24  
Mastermind  
Meet Up

August 24-25  
Leaders Retreat

# AGENDA

All times in Pacific Time Zone, event from 8:30 a.m. PT - 3:30 p.m. PT

January 23, 2023

- > Performance Playbook Welcome 8:30 AM-8:45 AM
- > Science of Success 8:45 AM-10:30 AM  
Team members welcome until 9:45 AM PT
- > Chat & Chow Discussion Rooms 10:25 AM-11:05 AM
- > Performance Playbook Overview & My Vision Workshop 11:00 AM-1:00 PM
- > My Time & Accountability Workshop 1:15 PM-2:45 PM
- > Closing: Your Retreat Roadmap 2:45 PM-3:30 PM

# JOIN THE GAME!



Home Schedule Community More



Challenges  
230 points • Rank 3

- Loudspeaker**  
Provide feedback to help others help you.  
0 points
- Speaker Cheerleader**  
Share ideas and questions during your sessions to le...  
0 points
- Chatty Cathy**  
Chat with your crew!  
0 points
- Session Star**  
Interact with your sessions. The more you...  
150 points
- Early Bird**  
You've already racked up points! Check out the...  
80 points

Leaderboard

PM	Phil McNulty	250 points
CK	Cheryl Krueger	250 points
	Alison Fouk	250 points





# SCIENCE OF SUCCESS



STEPHANIE  
BOGAN

UNCOMFORTABLY  
*Comfortable*



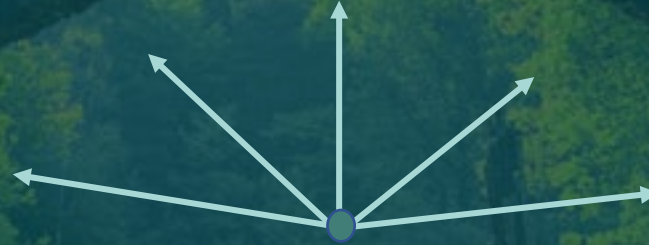
MEDIOCRITY

LIMITLESS

WHERE YOU ARE NOW  
*the experience you've created*



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



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

WHAT'S IN YOUR GAP

I can do it faster and better myself

I can't charge (more)

I need more people in the pipeline

There's not enough time to do everything

I have too many clients

I can't keep up with all the work

I don't like managing people

I'm not good at marketing

I'm the only one who does things right

I need more people in the pipeline

I need a consistent system

I don't know what to deliver to clients to demonstrate value

I hate quoting my fees



FILL IN YOUR BLANK IN THE CHAT



ENVIRONMENT



SKILL



MINDSET




LIMITLESS

80%

# MINDSET

A decorative graphic consisting of multiple thin, overlapping lines that form a wavy, ribbon-like shape. The lines are primarily teal and light green, with some orange and brown tones on the right side. The shape flows from left to right across the middle of the page.

An established set of  
*attitudes* held by  
someone; a person's  
*way of thinking*

A decorative graphic in the bottom right corner consisting of several concentric, overlapping circles in shades of teal and light blue.

LIMITLESS

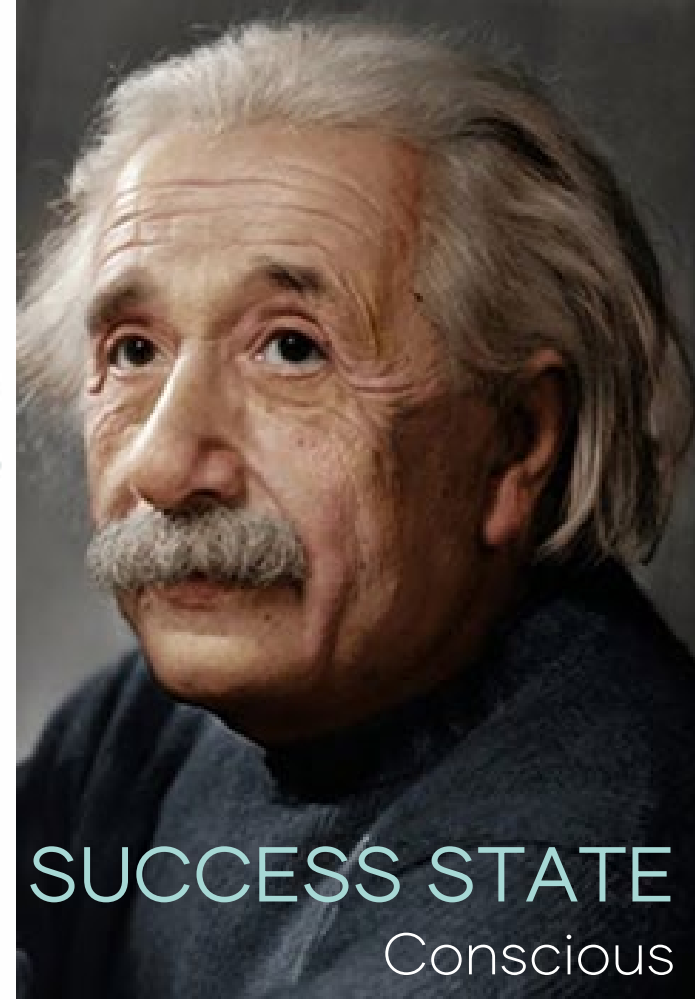
# ONE BRAIN TWO MINDS



**SURVIVAL STATE**  
Conditioned

## SUBCONSCIOUS

- Programmed by, lives in the past
- Instinctive, habit mind
- Hard-wired for survival
- Powered by emotion



**SUCCESS STATE**  
Conscious

## CONSCIOUS

- Lives in the present
- Present, future-focused
- Reasoning, logical mind
- Powered by reason

# OUR *operating system* MOST OF THE TIME

We have an average of 60,000 thoughts per day

80% of them are negative

We process 11 million bps info per second

Only 40 bps are processed by conscious mind

Our brains focus on negative inputs

By a factor of 7 to 1

We spend an avg. of 70%+ of our days "stressed"

Exist in a perpetual state of 'fight or flight'

When we're stressed, we default to auto pilot

Governed by our belief systems & conditioned behaviors

By age 35,  
we're 95% hard-wired,  
a set of pre-programmed behaviors



# BELIEF SYSTEMS

1

PRE-CONCEIVED MENTAL MODELS

2

INTERNAL PROCESS OCCURS COMPLETELY OUTSIDE  
OUR AWARENESS

3

WE ARE MEANING-MAKING MACHINES  
events have no meanings except the ones you give  
them

4

IN 1/5 SECOND BELIEFS DRIVE CONDITIONED  
REACTIONS  
(versus conscious responses)

5

YOUR STORIES SHAPE YOUR SUCCESS  
empowering or disempowering





I'm going to  
be eaten by a  
**HUNGRY**  
**LION**  
AND DIE!?!

# SHIFTING INTO SUCCESS- STATE

LEARNING TO MIND YOUR LINE

+

*SUCCESS STATE*



*STRESS STATE*

-

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# common LIMITING BELIEFS

1

MISTAKES  
ARE BAD,  
MAKE ME BAD.

2

I HAVE TO BE  
\_\_\_\_\_,  
TO BE \_\_\_\_\_.

3

I'M NOT  
WORTHY  
OF/DON'T  
DESERVE  
\_\_\_\_\_.

4

I AM NOT  
IMPORTANT  
OR LOVED.

5

I AM NOT  
ENOUGH.

L I M I T L E S S

# How DO THESE BELIEFS show up?

1

I CAN'T CHARGE  
(MORE) FOR  
PLANNING.

2

I CAN'T FOCUS  
ON A NICHE,  
I CAN'T...

3

IF I DO THAT OR  
CHARGE THAT,  
MY CLIENTS AND  
COI'S WILL  
REVOLT

4

ALL CLIENTS  
ARE GOOD  
CLIENTS, YES IS  
THE ONLY WAY  
TO WIN

5

I'M AN  
IMPOSTER,  
THEY'RE GOING  
TO FIND OUT

L I M I T L E S S



IDENTIFY & SHARE  
ONE LIMITING  
BELIEF

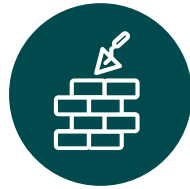
# BELIEFS

- Some beliefs help, some beliefs hinder
- You can move beyond auto-pilot
- Have to “interrupt” these habit loops
- Willpower is garbage
- Answer is awareness followed by action
- Upgrade your beliefs, upgrade your results





# IT'S A STATE OF BEING



## LIVING BEHIND 4 WALLS

Protect. Prove. Hide. Defend.



## CONDITIONAL LIVING

When (this happens), I'll be (happy).



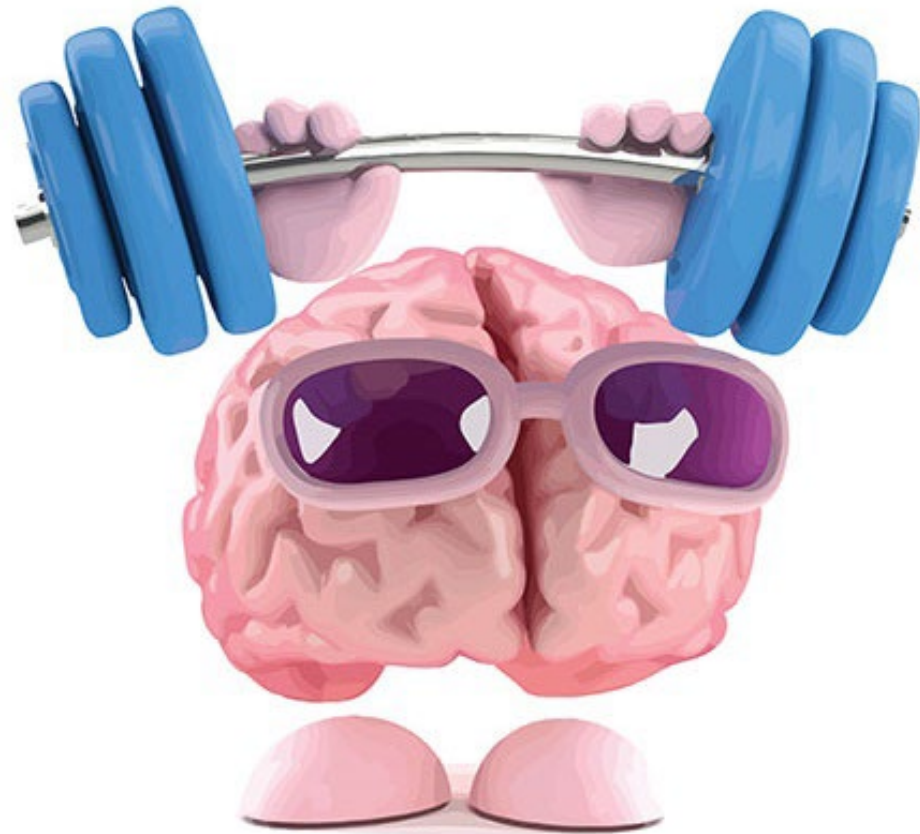
## EGO-DRIVEN

If (s/he) would just (act the way I want) then everything would be OK and I would be (happy).

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APPLYING WHAT  
YOU LEARN

LIMITLESS



# RETRAIN YOUR BRAIN

A Crash Course  
on How to Re-train your Brain  
for Greater Success and Well-Being

# THE 7 MINDSETS OF SUCCESS



LIMITLESS

Am I Worth It?  
Will They Say Yes?  
*Can I Say No?*



# *SHIFTING* THE CONVERSATION

with the voices in  
your head...



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# BREAKING THROUGH LIMITING BELIEFS



1

Take out a  
piece of  
paper



2

Draw a line  
across,  
dividing the  
page in half



3

Above the  
line list  
what's  
working?



4

Below the line  
list what's not  
working



5

What are  
your  
beliefs  
about  
what's  
below the  
line?

A magnifying glass with a black handle and silver rim is positioned over a light blue circular area. Inside the circle, the text "TAKING A CLOSER LOOK AT YOUR LIMITING BELIEFS" is written in a dark teal, sans-serif font.

TAKING A CLOSER  
LOOK AT YOUR  
**LIMITING BELIEFS**



What do you want and what's your story about why you don't have it?



What's the benefit of this belief? How does it serve you?



Where does it stop you / what's it costing you?

L I M I T L E S S

RECORD  
NEW & BETTER  
*Stories*

AWARENESS

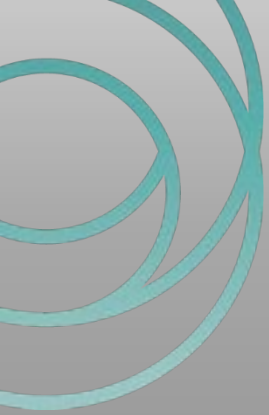
FEELING  
STATE

CATCH &  
CORRECT

NEW STORY

A 4-step  
process for  
Shifting  
your Stories





LIMITLESS

RAISING



AWARENESS

I can't  
do it



*Check out Hal Elrod's TED talk  
on Morning Routines*

Best  
PRACTICE

Rituals  
& Routines

# ASK BETTER QUESTIONS

*Get Better Answers*

- What would it take to...2x my income in half the time?
- What would it take to...get a referral from my top 10 clients and COIs in the next 90 days?
- What would it take to start digital marketing and find 100 ideal clients?
- WHAT'S IT COSTING ME TO SETTLE?

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L I M I T L E S S

## TERMS & CONDITIONS

You can be,  
have, achieve  
and experience  
whatever you  
desire.

You simply have  
to raise your  
standards.





## WATCH & READ

- The Formula for Change, Stephanie Bogan
- Take the Uncomfortable Leap, Stephanie Bogan
- Harnessing your Head Trash, Stephanie Bogan
- Mindset: The New Psychology of Success, Carol Dweck
- How to Unf\*ck Yourself, Gary John Bishop
- Think & Grow Rich, Napoleon Hill
- 10% Happier, Dan Harris



## APPLY

- Watch: Learning Path Mindset Mastery
- Read 7 Mindsets Guidebook
- Complete Shift Your Thinking Workbook
- Complete 7 Mindsets Activity



## ACT

- Start: A Daily Mindfulness practice
- Start: Minding your Line (ongoing)
- Start: Practicing "Catch & Correct" (ongoing)
- Daily Use: Success Shifter or Habits Journal



LIMITLESS Q&A

THANK YOU FOR JOINING US,  
LIFESTYLE & LEGACY TEAM MEMBERS!  
YOU ARE NOW EXCUSED AS WE DIVE INTO  
WORKSHOPS.

LEADERS TEAM MEMBERS ARE WELCOME TO STAY  
AS REQUESTED BY YOUR PRIMARY MEMBER.



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# SHOW & TELL:

## 7 MINDSETS OF SUCCESS

Learn from Liz and then take 7 minutes to fill in yours!

### 7-Mindsets of Success

The stories we tell ourselves are incredibly powerful, and can either keep us stuck or be the catalyst for change. List what you are currently telling yourself in each of the 7 mindset categories under "Old Story." Then, create and record the new story you want to believe. Consider which action steps you would need to take to make that new story a reality and record them under "Action Items." Consider adding these to your Success Shifter to create new beliefs and habits.

	KEY LEARNINGS		ACTION ITEMS
 WORTH	<b>Old Story</b> <ul style="list-style-type: none"><li>Nobody understands me</li><li>I'm not as good as others</li></ul>	<b>New Story</b> <ul style="list-style-type: none"><li>I speak wisdom &amp; distill the complex</li><li>I'm a valuable contribution to all with whom I work</li></ul>	<ul style="list-style-type: none"><li>Catch &amp; Correct when someone says "wait, what?"</li><li>Ruby picture posted at desk</li></ul>
 CLARITY	<b>Old Story</b> <ul style="list-style-type: none"><li>Others' needs come first</li></ul>	<b>New Story</b> <ul style="list-style-type: none"><li>I'm open and eager for what's next</li><li>When I shine, others have permission to shine also.</li></ul>	<ul style="list-style-type: none"><li>Daily envision practice of "Next Level Liz"</li><li>Bring vision convo to coach</li></ul>
 VALUE	<b>Old Story</b> <ul style="list-style-type: none"><li>Anyone can do what I do</li><li>I'm not doing this right, I'm a fraud</li></ul>	<b>New Story</b> <ul style="list-style-type: none"><li>I am magnetic when I am authentic.</li><li>I am curious &amp; always improving.</li></ul>	<ul style="list-style-type: none"><li>Clearing exercise before presenting</li><li>Catch &amp; Correct - breathe</li></ul>
 TIME	<b>Old Story</b> <ul style="list-style-type: none"><li>If I'm not sitting in my office chair, I'm not really working</li><li>No time for Liz - only others</li></ul>	<b>New Story</b> <ul style="list-style-type: none"><li>My highest contribution is connection and creativity.</li><li>I'm present to my needs &amp; meet them</li></ul>	<ul style="list-style-type: none"><li>Time block 8:30-10:30 COO</li><li>Time block Tu/Th Afternoon &amp; Fri for mindset coaching work</li></ul>
 LEVERAGE	<b>Old Story</b> <ul style="list-style-type: none"><li>Delegating is looking down on someone</li><li>Hierarchy is mean</li></ul>	<b>New Story</b> <ul style="list-style-type: none"><li>My team wants to support me</li><li>I am kind &amp; hierarchy is clarity</li></ul>	<ul style="list-style-type: none"><li>Prioritize Org Chart, Comp Plan, Liz's role transition over time</li></ul>
 RELATIONSHIPS	<b>Old Story</b> <ul style="list-style-type: none"><li>My pain is too much for others</li><li>I must make it easy for others</li></ul>	<b>New Story</b> <ul style="list-style-type: none"><li>Everyone is having the right experience</li><li>Let them build a resilience muscle.</li></ul>	<ul style="list-style-type: none"><li>Create container of time for feedback w/ husband, biz partner, service team</li><li>Catch &amp; Correct when lean in</li></ul>
 MONEY	<b>Old Story</b> <ul style="list-style-type: none"><li>Wealth is greed</li><li>My income limit is \$100k</li><li>Work hard</li></ul>	<b>New Story</b> <ul style="list-style-type: none"><li>I'm open to being an example of wealth!</li><li>Money in my hands changes the world.</li><li>Work in FLOW</li></ul>	<ul style="list-style-type: none"><li>Create friendship with wealthy woman</li><li>Create plan w/ Limitless re: comp &amp; biz development targets</li><li>Delegate BTL like HR admin</li></ul>

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# BREAKOUT INSTRUCTIONS

Please follow the below instructions for each workshop period. Need a coach to jump in your room for support or questions? Text that you need help and what breakout room you are in to 786-779-8886, and a coach will jump in to support you!

## SCIENCE OF SUCCESS

10:00 PT – 10:30 PT

**Timekeeper:** the first person to join the breakout room  
Coach Liz shared a sample of her 7 Mindsets Activity and you've had a few minutes to begin filling in your worksheet.

1. Timekeeper begins. Each of you have 5 minutes to share a "limiting story" you need to overcome and to work with the group to reframe into a new, empowering story.
2. Use some of your time sharing and some of your time getting feedback from your group.
3. Timekeeper, please mind the time and help keep the group on track (focus practice!).
4. Finish filling out your 7 Mindsets Activity after Retreat and join with Mindset Office Hours to work further. (The first one is Monday, February 6<sup>th</sup>.)

## YOUR VISION FOR SUCCESS & MY MODEL PRACTICE

12:00 PT – 1:00 PT

**Timekeeper:** the person whose first name starts first alphabetically

1. Timekeeper begins. Each member takes 10-12 minutes to share:
  - Your 3-year vision of your model practice, your 1-Page Business Plan goals and key objectives
  - Your top 3 priorities this year (what will really move the needle?)
2. Use some of your time sharing and some of your time getting feedback from your group.
3. Timekeeper, please mind time and help keep group on track (focus practice!).
4. With any extra time, ask clarifying questions such as, "What is your timeline for that goal? Do you have the resources in place to achieve your goal? What would make this achievable for you in quarter 2?"

## TAKING CONTROL OF YOUR TIME & ACTION & ACCOUNTABILITY

1:45 PT – 2:45 PT

**Timekeeper:** the person whose last name starts first alphabetically

1. Timekeeper begins. Each of you takes 10-12 minutes to share:
  - Status of drafting and implementing your Annual Calendar and Weekly Model Schedule.
  - Are you on track to check email 2x a day, what will this take to implement?
2. Share what habits you're focused on eliminating and building with your Success Shifter.
3. Use some of your time sharing and some of your time getting feedback from your group.
4. Timekeeper, please mind time and help keep group on track (focus practice!).

Timekeeper: the first person to join the breakout room.

- 1 Timekeeper begins. Each of you have 5 minutes to share a "limiting story" you need to overcome and to work with the group to reframe into a new, empowering story.
- 2 Use some of your time sharing and some of your time getting feedback from your group.
- 3 Timekeeper, please mind the time and help keep the group on track (focus practice!).
- 4 Finish filling out your 7 Mindsets Activity after Retreat and join with Mindset Office Hours to work further. (The first one is Monday, February 6<sup>th</sup> 1-2 PM PT).



# WHERE TO GO FROM HERE

## ALL LIFESTYLE & LEGACY MEMBERS & COMEMBERS

Sit tight in this same Zoom room!  
(Here's a virtual coffee and pastry for while you wait).



## ALL LEADERS MEMBERS & COMEMBERS

Please leave this room and go to your separate Zoom room session, open now on your agenda.  
(Take your virtual coffee and pastry with you).

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# CHAT & CHOW!

➔ Click Community → Discussions

➔ Click on the session you would like to join.

➔ Feel free to pop in and out of topic rooms!

The screenshot shows the Limitless website interface. At the top, there is a navigation bar with the Limitless logo on the left and links for Home, Schedule, Community, and More on the right. A dropdown menu is open under the Community link, showing options for Attendees, Discussions, Game, and Instant Networking. An orange arrow points from the Community link to the Discussions option. Below the navigation bar is a large banner image of a skier in a blue suit on a snowy slope. Below the banner, the text reads "Welcome, Allison, to Performance Playbook Virtual Retreat!". At the bottom of the banner, there is a secondary navigation bar with the same links as the top. Below the banner is a section titled "Upcoming" which contains several session cards. Each card has a title, a brief description, and a "Join" button. The sessions listed are: "All About Your Roadmap Call w/ Lauren", "Jump Start Your Journaling w/ Adam", "Limitless Q&A w/ Allison & Leona", "Managing Accountability w/ Tiffany", "Managing Teams to Vision w/ Jarrod", "Self-Talk for Success w/ Liz", and "Your Morning Ritual w/ Stephanie".

Home Schedule Community More

Attendees  
Discussions  
Game  
Instant Networking

Welcome, Allison, to Performance Playbook Virtual Retreat!

Home Schedule Community More

Upcoming

**All About Your Roadmap Call w/ Lauren**  
Dive into how to make the most of your Q1 roadmap call with Coach Lauren.

**Jump Start Your Journaling w/ Adam**  
Ready to unlock the power of a journaling practice? Join Adam to chat about how impactful his journaling has been to his success!

**Limitless Q&A w/ Allison & Leona**  
Got questions about the Limitless program, coaching calls, events, the website or tribe? Jump in this room to ask Allison and Leona!

**Managing Accountability w/ Tiffany**  
Chat about how to create a clear path toward holding yourself personally and professionally accountable.

**Managing Teams to Vision w/ Jarrod**  
Learn how to intentionally direct your team toward your practice vision and goals.

**Self-Talk for Success w/ Liz**  
Unlock the power of your inner voice by shifting the stories you tell yourself in this cozy chat with mindset coach Liz.

**Your Morning Ritual w/ Stephanie**  
Unlock the power hidden within your early morning hours and explore the impact it can have on all aspects of your life.



# Let's Review Your BASE CAMP Learning Path...



BASE CAMP 2023

## YOUR VISION FOR SUCCESS

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



BASE CAMP 2023

## MY MODEL PRACTICE

These lessons cover the framework for building a limitless practice and walk you through the Essentials lesson paths you'll learn and apply to build your 'model practice.'



BASE CAMP 2023

## ACTION & ACCOUNTABILITY

Get clear on fine-tuning the behaviors and habits that will support you in achieving your goals. Prepare to launch into your next (and best!) year by getting clear on your action items both professionally and personally.



BASE CAMP 2023

## TAKE CONTROL OF YOUR TIME

Learning how to master your time, energy and attention is perhaps the most powerful productivity hack of all. Learn key strategies you can use to manage your focus, harness your energy and take back control of your time.

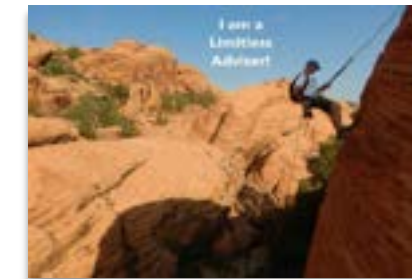
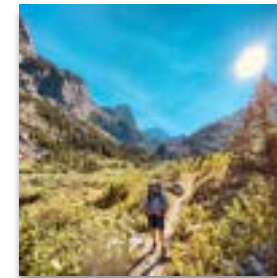
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# YOU NEED A WHY BIGGER THAN YOUR WHAT IF'S

"Grow my income \$100,000 a year so my wife can quit her miserable job and stay home with our kids; fulfill my dream of getting my pilot's license."

"Take Fridays off, grow revenue to \$750,000, pay off debts so we can enjoy a nicer lifestyle including 60 days of family travel."

"To simplify my \$1M practice so that I can work 2/3 time, stress-free, and deliver more value to clients in a simpler, more enjoyable way."



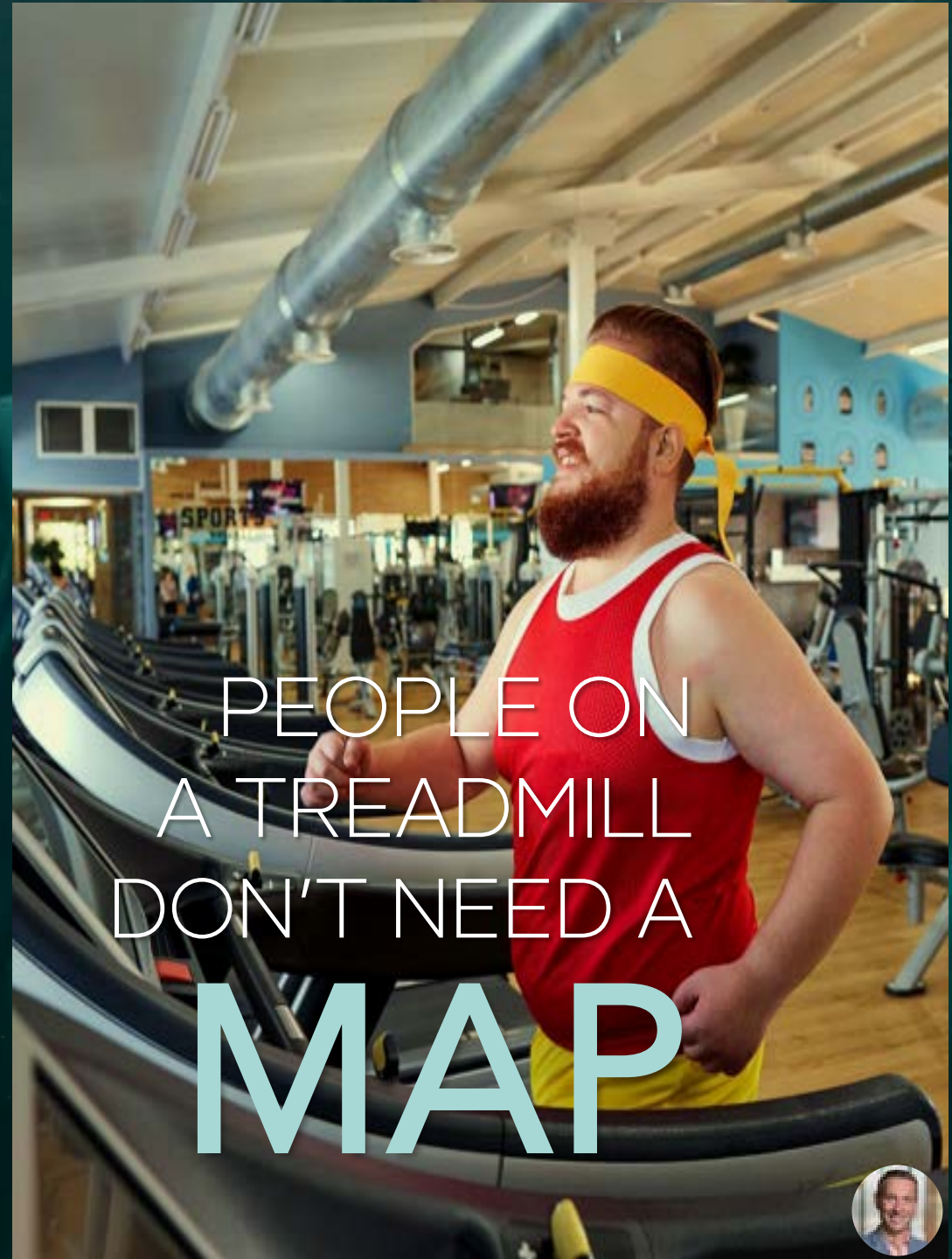
## WHY DO VISION PLANNING?

You're ready to create  
a clear and confident  
path that focuses you  
and accelerates  
your success.

## HIGHLIGHT THE GAP

between your current  
experience and your desired  
outcome to create a  
**ROADMAP FOR CHANGE**

PEOPLE ON  
A TREADMILL  
DON'T NEED A  
**MAP**



# MAPPING YOUR BUSINESS VISION

**My Model Practice**  
 Design your Model Practice by answering a series of simple questions about how you want to live and work. Together, your answers create the framework for your Limited Practice.



**HOW BIG DO I WANT TO BE?**  
 How much revenue do I want to have?  
 How much AUM do I want to have?  
 How many clients do I want to have?

**WHAT KIND OF LIFESTYLE DO I WANT TO ENJOY?**  
 How much EBOC/income do I want?  
 How many days off do I want?  
 How many days a week do I want to work?

**WHO DO I OBLIGATE MASSIVE VALUE TO?**  
 Who is my target client?  
 What are my minimum fees?  
 What are my services?

**HOW CAN I BEST INVEST MY TIME?**  
 What is my BEST?  
 What is my genius work?  
 Who are my top three clients?

*\$1M+ Revenue  
 50% EBOC  
 30-hr work week  
 8 weeks OOO  
 Fridays w/family*

**Mapping your BUSINESS VISION**

OUR VISION FOR SUCCESS		DESCRIBE WHAT THIS WILL LOOK LIKE		
MISSION				
VISION				
VALUES				
	CURRENT DO...	1-YEAR GOALS DO...	3-YEAR GOALS DO...	WHAT WILL IT TAKE?
REVENUE				
AUM				
Avg REV / CLIENT				
# DAYS OFF				
HOURS / WEEK				
# DEAL CLIENTS				
OTHER				

An exercise to help you create clarity about the practice you really want to build

An exercise in evaluating your goals, gaps, and what it will take to get there

3-YEAR VISION

1-YEAR GOALS

KEY OBJECTIVES

QUARTERLY PRIORITIES

## \$1M REVENUE + 100 DAYS OFF

### TAKE 60 DAYS OFF

- Maximize time
- Focus on \$1000/hr RPA
- Hire part-time assistant

### AUTOMATE WORK-FLOWS

- Build Client Service model
- Draft core processes
- Automate workflows

### GROW REVENUE 20% to \$600,000

- Increase Rev per Client to \$6,600
- 6 new clients from digital marketing
- 6 referrals

Q1	<ul style="list-style-type: none"> <li>Implement annual calendar and time blocking</li> <li>Hire Virtual Asst</li> </ul>
Q2	<ul style="list-style-type: none"> <li>Implement Calendly</li> </ul>
Q3	<ul style="list-style-type: none"> <li>Hire Virtual Paraplanner</li> </ul>
Q4	

<ul style="list-style-type: none"> <li>Define segments services &amp; staffing</li> </ul>	<ul style="list-style-type: none"> <li>Hire Redtail consultant</li> </ul>
<ul style="list-style-type: none"> <li>Draft materials</li> </ul>	<ul style="list-style-type: none"> <li>Client reviews</li> <li>Client reviews</li> </ul>
	<ul style="list-style-type: none"> <li>New client onboarding</li> <li>New client onboarding</li> </ul>
<ul style="list-style-type: none"> <li>Prospect process</li> </ul>	<ul style="list-style-type: none"> <li>Prospect process</li> </ul>

<ul style="list-style-type: none"> <li>Choose niche</li> </ul>	<ul style="list-style-type: none"> <li>Plan &amp; Prep for Q2 podcast launch</li> </ul>	<ul style="list-style-type: none"> <li>Re-launch niche to COIs</li> </ul>
<ul style="list-style-type: none"> <li>Fee increase to \$6,600</li> </ul>	<ul style="list-style-type: none"> <li>Google/SEO</li> </ul>	<ul style="list-style-type: none"> <li>24 COI meetings</li> </ul>
	<ul style="list-style-type: none"> <li>1,000 downloads</li> <li>20 digital prospects</li> </ul>	

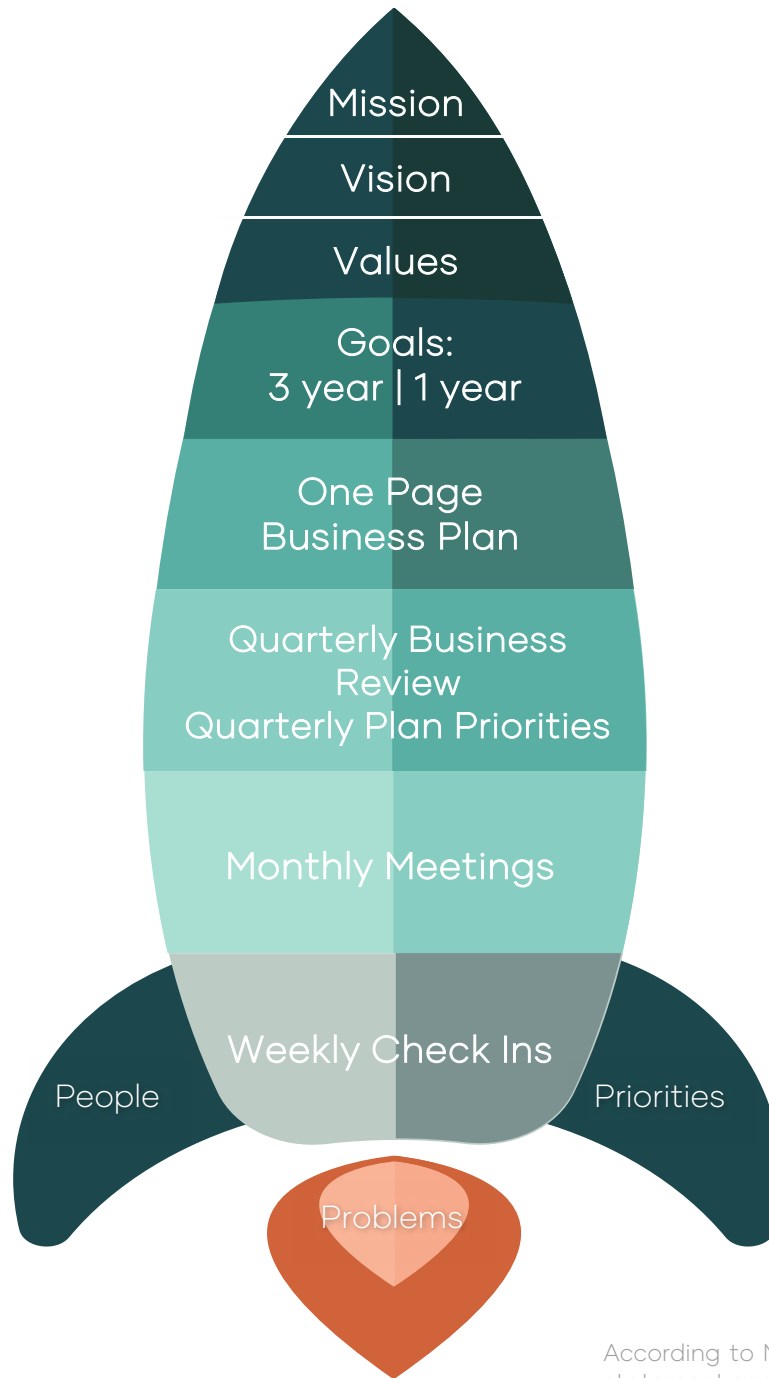


YOUR VISION FOR SUCCESS  
ACTION & ACCOUNTABILITY

# THE LIMITLESS LAUNCH PROCESS

A simple business planning process to  
take agency over your practice and  
achieve new levels of success

YOU CAN'T  
**MANAGE**  
WHAT YOU  
CAN'T  
**MEASURE**



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.

# THE LIMITLESS LAUNCH PROCESS



## DAILY ROUTINE

- Daily Routines support high-performance happiness

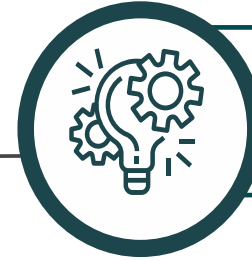


## WEEKLY CHECK-IN

- Check in on week
- Assess productivity & progress
- Celebrate wins
- Identify next week's priorities



## ANNUAL STRATEGIC PLANNING MEETING



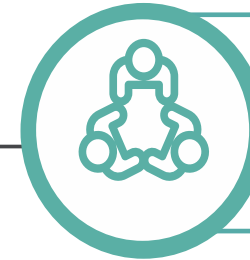
- Establish vision for future
- Set annual priorities and goals
- Align team and gain commitments

## QUARTERLY BUSINESS REVIEW



- Review financial performance
- Review practice & growth performance
- Qtr Priorities: status check, set next Qtr

## MONTHLY BUSINESS MEETING



- Finance review
- Pipeline review
- Schedule review
- Compliance meeting (optional)

## WEEKLY TEAM MEETINGS



- Open client service
- Upcoming meeting prep
- Prospect pipeline
- Align team and gain commitments



Watch Strategic Planning lesson



# TAKING CONTROL OF YOUR TIME

## LIMITLESS ADVISOR

### 1. CLARITY

You begin with the end in mind. You have a clear vision of the end result you are working to achieve.

### 2. FOCUS

You are fanatical about focus. You direct your attention where it will have greatest impact and value.

### 3. PACE

You are active, not busy. You work hard but are not overwhelmed. Busy-ness is a sign of poor mindset and methods.

## PRODUCTIVITY MINDSET

### 4. PROTECT

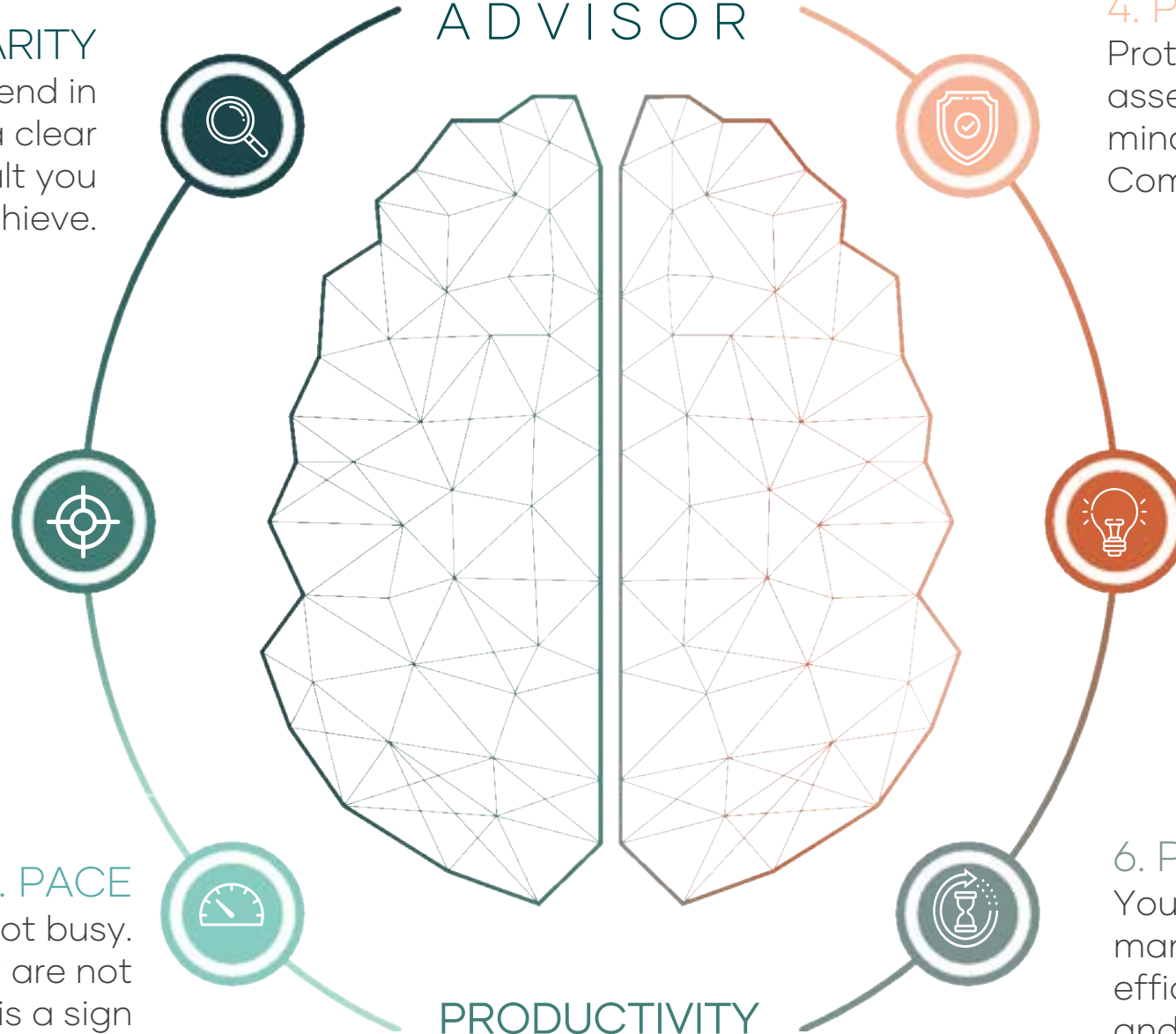
Protect the asset. You are the asset and maintain your body, mind and spirit for peak state. Compromise has serious costs.

### 5. INTENTION

All efforts have purpose. You've learned "No" is a complete sentence and selectively focus where it matters most.

### 6. PROCESS

You manage work, it doesn't manage you. You achieve hyper-efficiency with routines, systems and automated workflows.



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# TAKING CONTROL OF YOUR TIME

## ELIMINATE DISTRACTIONS

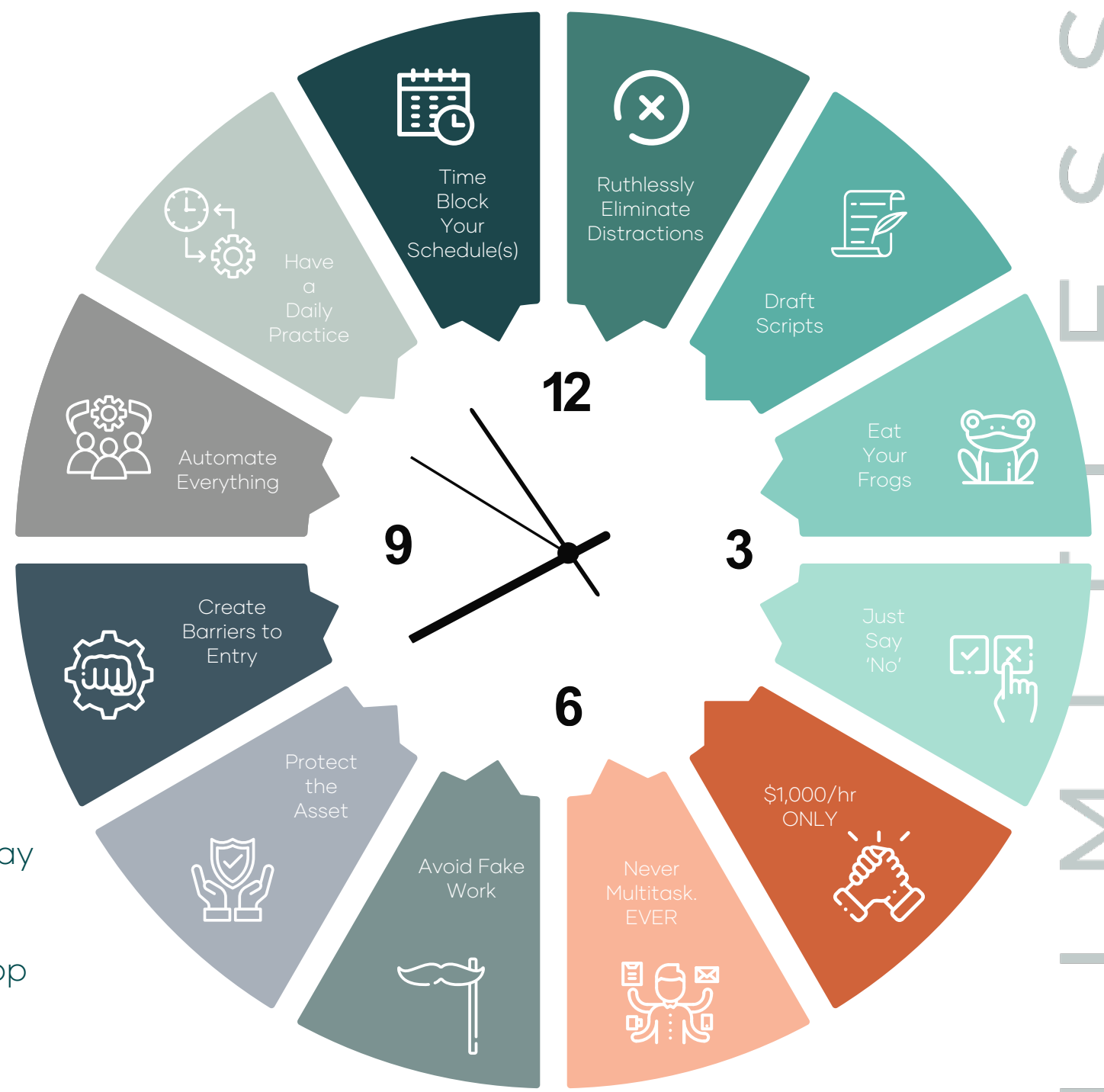
HOUR WORK DAY

=

PRODUCTIVE HOURS

### PRODUCTIVITY HACKS

- o How to Set up Your iPhone for Focus and Productivity
- o Scheduling Software (Acuity, Calendly)
- o Site blockers (Focus Booster, Brain Focus, Stay Focused)
- o Time management apps (Rescue Time)
- o Put a picture of what matters on your desktop
- o Momentum
- o *See Taking Control of Your Time Guidebook*

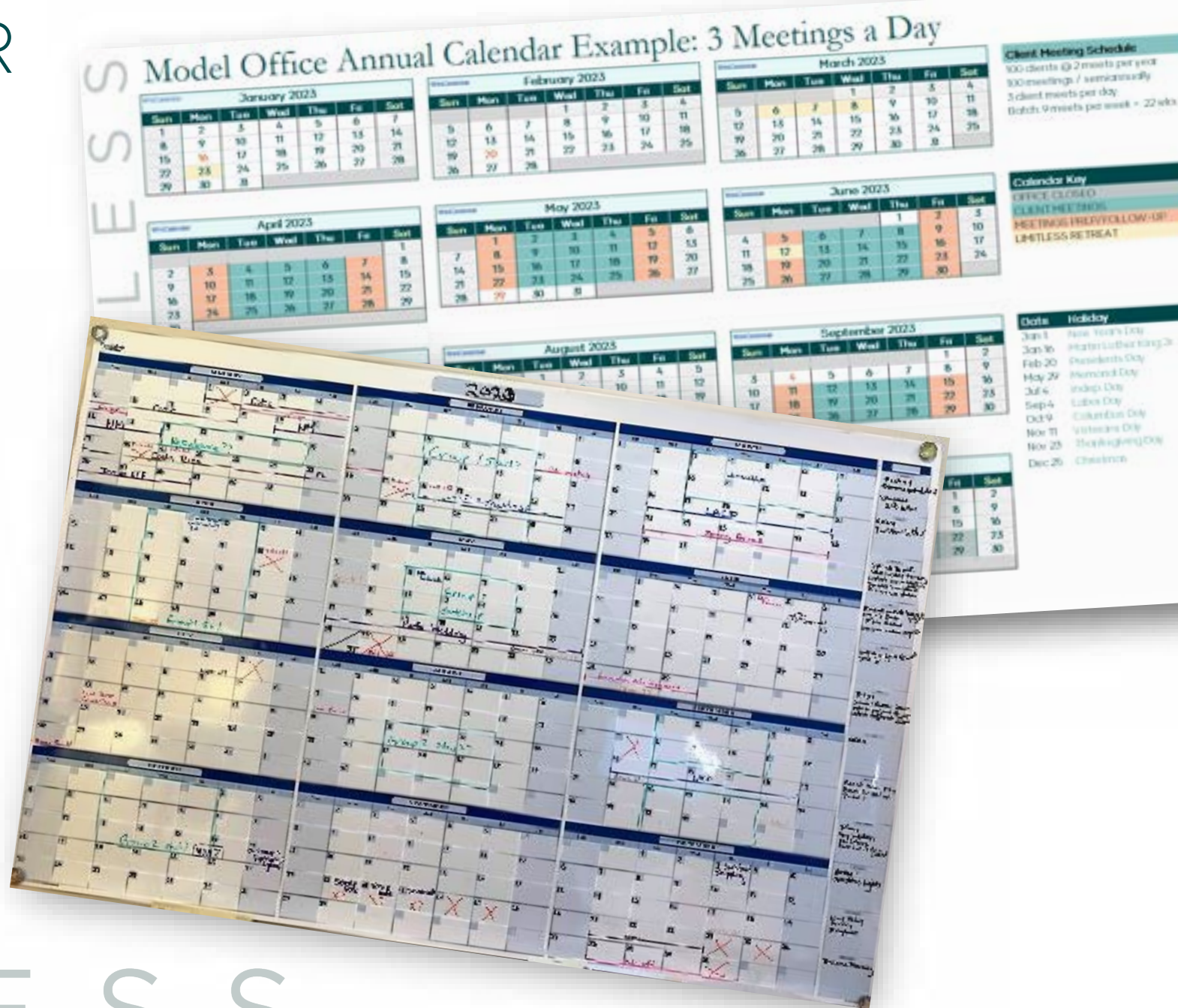


# ANNUAL CALENDAR

*the vehicle for the vision*

## SCHEDULE PRIORITIES...

- Vacation and holidays
- Client surge weeks
- Client events
- Marketing time
- Quarterly billing
- Quarterly Business Review
- Annual / Strategic Planning
- Other VIP items



# CLIENT MEETING SURGES

*Batching meetings for maximum efficacy and deeper value*



## THE *Meeting* PROCESS: BEST PRACTICE

4 Simple Steps to a More Streamlined, Satisfying Review Meeting Experience

### 1 SCHEDULING

- Contact clients and provide Acuity link  
6 weeks out
- Send reminder to schedule email  
4 weeks out
- Call clients that haven't scheduled  
3 weeks out
- Send Meeting Confirmation Letter  
Upon scheduling

### 2 PREPARING

- Review client situation; confirm Meeting Agenda  
4 weeks out
- Email Meeting Agenda to client for feedback  
3 weeks out
- Engage COI touchpoint  
3 weeks out
- Case Prep: One-Page Plan, projections, materials  
2 weeks out
- Reminder Email to client/COI  
1 week out
- Prep "Meeting Room"  
Day of

### 3 THE MEETING

- Meeting Room, prepped & ready
- If on-site, greet and direct to meeting room
- If virtual, login with welcome slide  
15 minutes prior
- Meet with client(s)  
75 minutes
- Adviser downloads notes & next steps  
15 min following

### 4 FOLLOW-UP

- Draft One-Page Plan/ Meeting Summary  
1-3 days following
- One-Page Plan/Meeting Summary to client  
3 days post (NLT 5 days)
- Post meeting check-in with client  
30-60-90 days (tailor)

**CX touchpoints**

- Scheduling email w/ calendar link
- Reminder email with calendar link
- Meeting confirmation letter
- Meeting Agenda
- Meeting reminder with agenda for input
- Personal welcome
- Meeting environment
- Meeting materials
- Meeting Agenda
- Talking points
- Meeting follow-up email

# Weekly SCHEDULE

*surge and non-surge weeks*

## SCHEDULE PRIORITIES...

- Mondays: work "on" business
- Tues-Thurs: client meetings or other
- Fridays: free or focus on growth/priorities
- Non-surge weeks:
  - Business development
  - Business management
  - Portfolio management
  - CE/Professional development
  - Team training and development
  - Free time

**Weekly Adviser Schedule: Client Meeting Sample**

INSTRUCTIONS: The below is template for you to customize to your own needs. We recommend time blocking so each day of the week is set aside for a specific purpose. When using the template to create your own schedule, we recommend adjusting to accommodate your annual schedule (days out of the office, strategic planning days, client meeting weeks, etc.) as time should flex to accommodate the broader picture. Another option is to create focus weeks where types of days (business work, client meetings, time off months) are grouped by week rather than by a regularly assigned day of the week. You can use this model to define the day "types" by simply removing the days of the week and adding any additional day types.

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
	PLAN & PREP	CLIENT DAY	CLIENT DAY	CLIENT DAY	GROWTH, BUSINESS, FREE
7:00					
7:30					
8:00					
8:30	Daily Prep & Email	Daily Prep & Email	Daily Prep & Email	Daily Prep & Email	Daily Prep & Email
9:00					
9:30	WEEKLY CLIENT MEETING	CLIENT APPT 75 mins	CLIENT APPT / WORK 75 mins	CLIENT APPT / WORK 75 mins	
10:00		buffer	buffer	buffer	
10:30	CLIENT MEETING PREP	CLIENT APPT 75 MINS	CLIENT APPT 75 MINS	CLIENT APPT 75 MINS	GROWTH AND MARKETING ACTIVITIES (or free time)
11:00	Review prep, prep				
11:30	MONTHLY BUSINESS LUNCH for people with teams	LUNCH	MARKETING LUNCH	LUNCH	
12:00	buffer	buffer			
12:30					
1:00	ADVISER TIME				
1:30					
2:00					
2:30					

**Weekly Adviser Schedule: No Client Meetings SAMPLE**

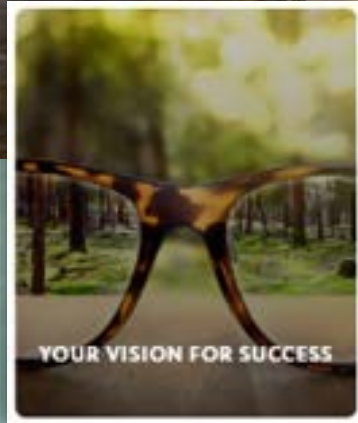
INSTRUCTIONS: The below is template for you to customize to your own needs. We recommend time blocking so each day of the week is set aside for a specific purpose. When using the template to create your own schedule, we recommend adjusting to accommodate your annual schedule (days out of the office, strategic planning days, client meeting weeks, etc.) as time should flex to accommodate the broader picture. Another option is to create focus weeks where types of days (business work, client meetings, time off months) are grouped by week rather than by a regularly assigned day of the week. You can use this model to define the day "types" by simply removing the days of the week and adding any additional day types.

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
	Prep Day	Meetings & Clients	Meetings & Clients	Leadless	Prospecting / Out Of Office Day
7:00					
7:30					
8:00					
8:30	8:30 - 4:30 EXAMPLE				
9:00	Daily Prep & Email	Daily Prep & Email	Daily Prep & Email	Daily Prep & Email	Daily Prep & Email
9:30					
10:00	WEEKLY CLIENT MEETING	YOU DECIDE	YOU DECIDE	YOU DECIDE	GROWTH AND MARKETING ACTIVITIES (or free time)
10:30		Free or work, your call	Free or work, your call	Free or work, your call	
11:00	WEEKLY CLIENT PREP	RESEARCH / INVESTMENTS	RESEARCH / PLANNING	RESEARCH / INVESTMENTS	
11:30	MONTHLY BUSINESS LUNCH for people with teams	LUNCH	MARKETING LUNCH	LUNCH	LUNCH OUT
12:00	buffer	buffer	buffer	buffer	LUNCH OUT
12:30					
1:00	WEEKLY BUSINESS MEETING Founder / Partners	CLIENT SERVICE	CLIENT SERVICE	LEADLESS CALLS	MARKETING ACTIVITIES
1:30		buffer	buffer	buffer	BUSINESS WORK
2:00	PROFESSIONAL DEV (READING)	CLIENT SERVICE	CLIENT SERVICE	LEADLESS CALLS	
2:30		buffer	buffer	WORK AND TEAM MEETINGS	
3:00		Daily Wrap Up	Daily Wrap Up	Daily Wrap Up	READING
3:30					PROFESSIONAL DEV
4:00					
4:30					

# THESE BASE CAMP LESSONS SET YOU ON A PATH TO SUCCESS



SCIENCE OF  
SUCCESS



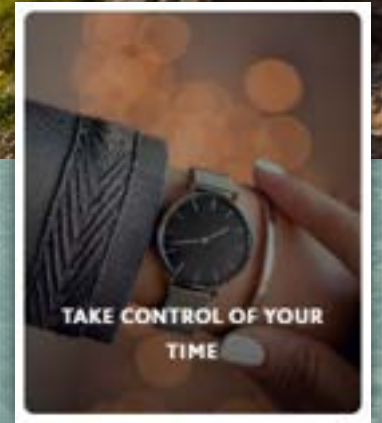
YOUR  
VISION FOR  
SUCCESS



MY MODEL  
PRACTICE



ACTION AND  
ACCOUNTABILITY



TAKING  
CONTROL OF  
YOUR TIME

# SHOW & TELL: MY MODEL PRACTICE



## My Model Practice

Design your Model Practice by answering a series of simple questions about how you want to live and work. Together, your answers create the framework for your Limitless practice.



### HOW BIG DO I WANT TO BE?

How much revenue do I want to have?

How much AUM do I want to have?

How many clients do I want to have?

### WHAT KIND OF LIFESTYLE DO I WANT TO ENJOY?

How much EBOC/income do I want?

How many days off do I want?

How many days a week do I want to work?

### WHO DO I DELIVER MASSIVE VALUE TO?

Who is my ideal client?

What are my minimum fees?

What are my services?

### HOW CAN I BEST INVEST MY TIME?

What is my ROI?

What is my genius work?

Who are my top three RFPs?



LIMITLESS

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# SHOW & TELL: YOUR VISION FOR SUCCESS



LIMITLESS

## 2023 1-Page *Business Plan*



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## BREAKOUT INSTRUCTIONS

Please follow the below instructions for each workshop period. Need a coach to jump in your room for support or questions? Text that you need help and what breakout room you are in to 786-779-8886, and a coach will jump in to support you!

### SCIENCE OF SUCCESS

10:00 PT – 10:30 PT

**Timekeeper:** the first person to join the breakout room  
Coach Liz shared a sample of her 7 Mindsets Activity and you've had a few minutes to begin filling in your worksheet.

1. Timekeeper begins. Each of you have 5 minutes to share a "limiting story" you need to overcome and to work with the group to reframe into a new, empowering story.
2. Use some of your time sharing and some of your time getting feedback from your group.
3. Timekeeper, please mind the time and help keep the group on track (focus practice!).
4. Finish filling out your 7 Mindsets Activity after Retreat and join with Mindset Office Hours to work further. (The first one is Monday, February 6<sup>th</sup>)

### YOUR VISION FOR SUCCESS & MY MODEL PRACTICE

12:00 PT – 1:00 PT

**Timekeeper:** the person whose first name starts first alphabetically

1. Timekeeper begins. Each member takes 10-12 minutes to share:
  - Your 3-year vision of your model practice, your 1-Page Business Plan goals and key objectives
  - Your top 3 priorities this year (what will really move the needle?)
2. Use some of your time sharing and some of your time getting feedback from your group.
3. Timekeeper, please mind time and help keep group on track (focus practice!).
4. With any extra time, ask clarifying questions such as, "What is your timeline for that goal? Do you have the resources in place to achieve your goal? What would make this achievable for you in quarter 2?"

### TAKING CONTROL OF YOUR TIME & ACTION & ACCOUNTABILITY

1:45 PT – 2:45 PT

**Timekeeper:** the person whose last name starts first alphabetically

1. Timekeeper begins. Each of you takes 10-12 minutes to share:
  - Status of drafting and implementing your Annual Calendar and Weekly Model Schedule.
  - Are you on track to check email 2x a day, what will this take to implement?
2. Share what habits you're focused on eliminating and building with your Success Shifter.
3. Use some of your time sharing and some of your time getting feedback from your group.
4. Timekeeper, please mind time and help keep group on track (focus practice!).

Timekeeper: the person whose first name starts first alphabetically

1

Timekeeper begins. Each member takes 10-12 minutes to share:

- Verbally share your 3-year vision of your model practice, your 1-Page Business Plan goals & key objectives
- Your Top 3 priorities this year (what will really move the needle?)

2

Use some of your time sharing and some of your time getting feedback from your group.

3

Timekeeper, please mind the time and help keep the group on track (focus practice!).

4

With any extra time, ask clarifying questions such as, "What is your timeline for that goal? Do you have the resources in place to achieve your goal? What would make this achievable for you in quarter 2?"



# WHERE TO GO FROM HERE

## ALL LIFESTYLE & LEGACY MEMBERS & COMEMBERS

Sit tight in this  
same Zoom room!



## ALL LEADERS MEMBERS & COMEMBERS

Please leave this room  
and go to your separate  
Zoom room session,  
open now on your  
agenda.

Welcome back!

TAKING CONTROL OF YOUR TIME  
& ACTION & ACCOUNTABILITY  
WORKSHOP UP NEXT



# SHOW & TELL: TAKING CONTROL OF YOUR TIME

Destiny Capital Standards Work Week

### DC Standards Work Week

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
CLIENT SERVICE	CLIENT SERVICE	CLIENT SERVICE	CLIENT SERVICE	CLIENT SERVICE
INTERNALLY CONNECT	MEETINGS	MEETINGS	MEETINGS	REFLECTION
TEAM TRAININGS	CLIENT SERVICE MODEL	CLIENT SERVICE MODEL	CLIENT SERVICE MODEL	CLOSURE
PLAN & PREP	GROWTH PROJECT	GROWTH PROJECT	GROWTH PROJECT	PREPARE FLEX

Jarrold's Sample Schedule



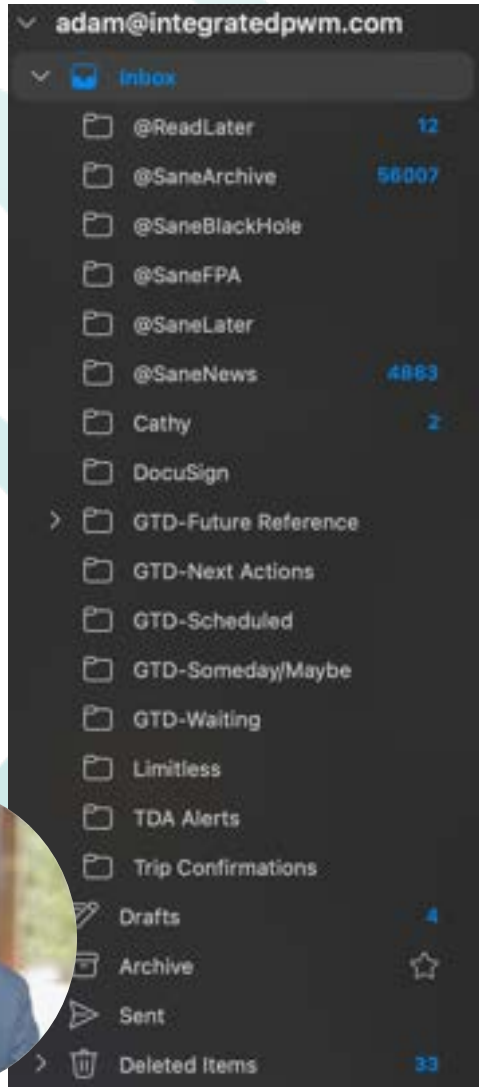
Destiny Capital 2023 Core Calendar

### The 2023 Calendar

Tiffany's Ideal Schedule



# SHOW & TELL: TAKING CONTROL OF YOUR TIME



## Email Delegation Process: SAMPLE

### Managing Stephanie's Email Inbox

PROCESS OWNER: Executive Assistant  
FREQUENCY: 3x Daily

**PURPOSE:** Email is a necessary communication tool and a galactic time suck. Stephanie gets paid to THINK and your job is to make sure she sees only the emails that require her attention while keeping her fully informed of what is happening at any time.

**ROLE:** The Executive Assistant's job is to make sure Stephanie delivers as promised, on time, every time. Expertly managing Stephanie's email is critical to meeting this standard.

- Your #1 job is to think. We can't write thinking into this process, so we're counting on you.
- Your job is to manage Stephanie's email so that it is processed, appropriately handled and/or prepared for Stephanie so that she can respond efficiently.
- You will intake, screen, organize and process all that you are able, focus Stephanie's attention on the items that require her personal attention, and ensure that all activities are captured, scheduled and followed-through on so Stephanie can focus her time on high-value/high-impact activities.
- You will stay apprised of all of Stephanie's current clients and ongoing activities, keeping up-to-date on Stephanie's priorities and projects, goals and timelines and what she wants/needs to do with each on an ongoing basis so that you can process, schedule and oversee projects.

#### PROCESS:

- Check email 3x daily at 8 a.m., 12:00 p.m. and 4 p.m. to filter, organize and process and/or prepare Stephanie's incoming email so that she can review, [respond] or direct as needed.
- Stephanie consistently checks email 1x day in her "Daily Prep" work-block. She will often check again in her 30-minute "Daily Wrap" work-block as time allows, but don't rely on this.

#### RULES OF THE ROAD:

- **BE EFFICIENT.** Checking and processing email should take no more than 30 minutes each time.
- **RESPONSE TIME.** Incoming emails should never go more than 2 days without a response. An email received on Monday should receive a reply by Wednesday. Time sensitive emails should be handled with appropriate urgency.
- **QUESTIONS?** When in doubt about how to process an email, ask Stephanie. All but urgent questions should be held for your Daily Check in (DCI) with Stephanie. If urgent, WhatsApp Stephanie.
- **MAKE IT EASY FOR HER.** Read each incoming email thoughtfully, scan for reply, actions or work needed in response.
- **KEEP HER INFORMED.** Stephanie likes to be informed of what's happening but doesn't need every detail. Note quick FYIs to cover in DCI.

LIMITLESS

# SHOW & TELL: SUCCESS SHIFTER

		LIMITLESS																																	
FEBRUARY 2023		GD	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	1	2	3	TT	
<b>HEALTH &amp; WELL BEING</b>																																			
Morning Routine & Meditation	24																																		
Outside Activity	31																																		
Exercise (yoga, ski, run)	24																																		
Intermittent fast	24																																		
Ski days	12																																		
Daily Reading	20																																		
<b>FAMILY &amp; COMMUNITY</b>																																			
Walk dog (with PK)	20																																		
Date night with Damon (Tues)	4																																		
Girls Night w/Emma	4																																		
Hang time with PK	4																																		
Family Reading Time	12																																		
Math Practice w/Emma	20																																		
Daily Homework Checks	20																																		
<b>PRODUCTIVITY</b>																																			
Daily Clarity Start	6/d																																		
Check Email 2x day	2/d																																		
DCI w/Lauren	3/w																																		
DCI w/Jackie	3/w																																		
Friday Check In	4																																		
Hours worked	6/d																																		
<b>BUSINESS</b>																																			
Check Tribe	12																																		
Shoot videos	8																																		
Social Posts	12																																		
COI connection	12																																		
Writing, daily HPH blog	28																																		
Member calls	12																																		
Leaders Check Ins	15																																		
NIGOs	0																																		
<b>DAILY REVIEW</b>																																			
HPH Vibes Day	1-10																																		



## BREAKOUT INSTRUCTIONS

Please follow the below instructions for each workshop period. Need a coach to jump in your room for support or questions? Text that you need help and what breakout room you are in to 786-779-8886, and a coach will jump in to support you!

### SCIENCE OF SUCCESS

10:00 PT – 10:30 PT

**Timekeeper:** the first person to join the breakout room  
Coach Liz shared a sample of her 7 Mindsets Activity and you've had a few minutes to begin filling in your worksheet.

1. Timekeeper begins. Each of you have 5 minutes to share a "limiting story" you need to overcome and to work with the group to reframe into a new, empowering story.
2. Use some of your time sharing and some of your time getting feedback from your group.
3. Timekeeper, please mind the time and help keep the group on track (focus practice!).
4. Finish filling out your 7 Mindsets Activity after Retreat and join with Mindset Office Hours to work further. (The first one is Monday, February 6<sup>th</sup>)

### YOUR VISION FOR SUCCESS & MY MODEL PRACTICE

12:00 PT – 1:00 PT

**Timekeeper:** the person whose first name starts first alphabetically

1. Timekeeper begins. Each member takes 10-12 minutes to share:
  - Your 3-year vision of your model practice, your 1-Page Business Plan goals and key objectives
  - Your top 3 priorities this year (what will really move the needle?)
2. Use some of your time sharing and some of your time getting feedback from your group.
3. Timekeeper, please mind time and help keep group on track (focus practice!).
4. With any extra time, ask clarifying questions such as, "What is your timeline for that goal? Do you have the resources in place to achieve your goal? What would make this achievable for you in quarter 2?"

### TAKING CONTROL OF YOUR TIME & ACTION & ACCOUNTABILITY

1:45 PT – 2:45 PT

**Timekeeper:** the person whose last name starts first alphabetically

1. Timekeeper begins. Each of you takes 10-12 minutes to share:
  - Status of drafting and implementing your Annual Calendar and Weekly Model Schedule.
  - Are you on track to check email 2x a day, what will this take to implement?
2. Share what habits you're focused on eliminating and building with your Success Shifter.
3. Use some of your time sharing and some of your time getting feedback from your group.
4. Timekeeper, please mind time and help keep group on track (focus practice!).

Timekeeper: the person whose last name starts first alphabetically

1

Timekeeper begins. Each member takes 10-12 minutes to share:

- Status of drafting and implementing your Annual Calendar and Weekly Model Schedule,
- Are you on track to check email 2x a day, what will this take to implement?

2

Share what habits you're focused on eliminating and building with your Success Shifter.

3

Use some of your time sharing and some of your time getting feedback from your group.

4

Timekeeper, please mind time and help keep group on track (focus practice!).



# WHERE TO GO FROM HERE

## ALL LIFESTYLE & LEGACY MEMBERS & COMEMBERS

Sit tight in this  
same Zoom room!



## ALL LEADERS MEMBERS & COMEMBERS

Please leave this room  
and go to your separate  
Zoom room session,  
open now on your  
agenda.

BREATHE...





LIMITLESS Q&A

## Starting Today

How do you fit a certain number of hours in a day? Why do some people seem to do more to meet their goals? There are a lot of factors, but part of this is the ability to create a task and to accomplish it when looking at what you want to achieve, by breaking it down into a single process.

**DEFINE YOUR GOAL:** If you don't know what you want to achieve, it will be hard to accomplish it. Consider starting with simple actions that will create a big impact.

"I will set my annual schedule and block client meetings."

**COMMIT TO DOING IT:** You have to want it, so commit to it - really commit. If you know the cost and importance of your goal, your commitment increases.

"I will set my annual schedule and block client meetings because it will give me the freedom and flexibility to work from anywhere and more time for things that are important to me personally."

**DO IT!** Next, do what needs to be done. Find yourself stuck? Give yourself a deadline and on that date commit to completing something that will move you forward.

"Starting today, I will set my annual schedule and block client meetings because it will give me the freedom and flexibility to work from anywhere and more time for things that are important to me personally."

**CREATE THE HABIT:** For anything to stick, you need to keep doing it, it's that simple.

"Follow my annual schedule is on my monthly Success Sheet & I track if I follow it each day"



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# STARTING TODAY, I WILL...



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# LIMITLESS

## YOUR GUIDE MAP

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

## LIMITLESS PROGRAM MAP



## YOUR LIMITLESS PRACTICE AND LIFE!

## PERFORMANCE PLAYBOOK RETREAT

CONTAINS THESE LEARNING PATHS: MINDSET MASTERY, BUSINESS PLANNING, TAKING CONTROL OF YOUR TIME



**TRAILHEAD LESSON**  
**SCIENCE OF SUCCESS**  
Master your mindset to master anything.

**KEY ACTIONS:** As you move through each lesson in this guide, complete these action items to progress along the path to your Limitless Practice.

- Read the "7 Mindsets of Success Guidebook" and use the "7 Mindsets of Success Activity" worksheet to evaluate any limiting beliefs and up-level your current mindset.
- Use the "Above the Line - Task Transition" worksheet to transition away from energy-draining activities.
- Begin using the "Success Shifter" to build habits that create high-performance happiness in work and life.

### DESIRED OUTCOMES

Get clear on how mindset impacts your work, wealth and well-being; Gain clarity on what's holding you back and strategies to shift your mindset into a more consistent success state!

### LESSON RESOURCES

- 7 Mindsets of Success Guidebook
- Shift your Thinking Workbook
- 5 Freedoms of Limitless Advisers
- 7 Mindsets of Success Activity
- Success Shifter
- Above the Line - Task Transition
- My Limitless Life
- Building Better Beliefs Workbook
- Starting Today | WILL Activity

### READY FOR A CHALLENGE?

Reach new heights with these next-level lessons:

- Self-Talk for Success
- Relationship to Money
- Overcoming Overwhelm
- Creating Change

COMING TO YOUR INBOX NEXT WEEK!

# 2023 COACHING ROADMAP



## Q1 FOCUS: CLARITY AND ACCOUNTABILITY

### YOUR Q1 PRIORITIES

- Complete Base Camp Lessons and Resources
- Implement Time Models
- Power up Personal Productivity

### FIRM ACTION ITEMS

- Watch Base Camp Lessons
- Implement time/productivity models
- Join February High-Performance Happy Sprint

### YOUR ACTION ITEMS

- Draft 3-year vision
- Complete 1-page business plan

### RELATED LESSONS

- Science of Success
- Vision for Success
- Taking Back Your Time
- Action and Accountability
- Success Shifter



## Q2 FOCUS: DEFINING AND DELIVERING VALUE

### YOUR Q2 PRIORITIES

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

### FIRM ACTION ITEMS

### YOUR ACTION ITEMS

### RELATED LESSONS



## Q3: SCALING YOUR SPECIAL

### YOUR Q3 PRIORITIES

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

### FIRM ACTION ITEMS

### YOUR ACTION ITEMS

### RELATED LESSONS



## Q4 FOCUS: GEARING UP FOR GROWTH

### YOUR Q4 PRIORITIES

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

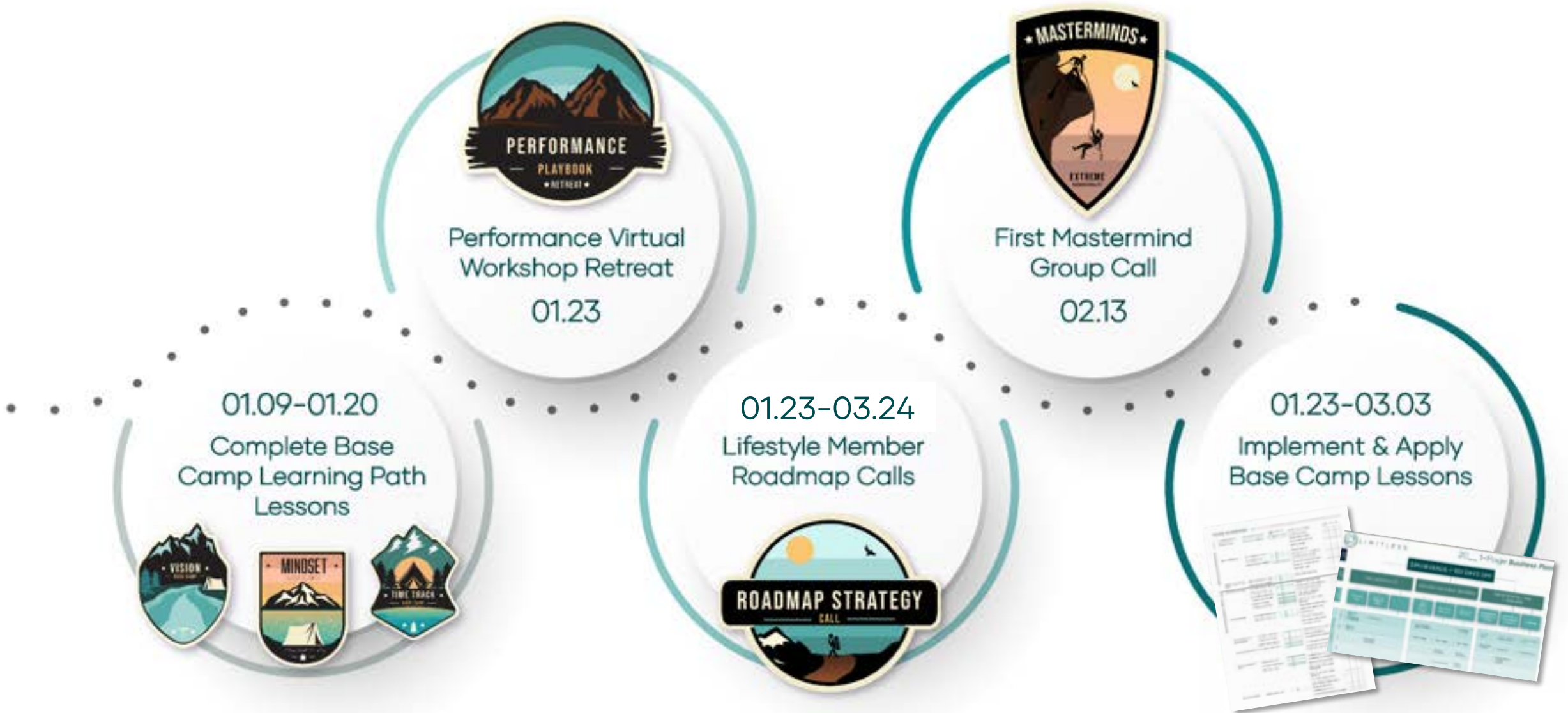
### FIRM ACTION ITEMS

### YOUR ACTION ITEMS

### RELATED LESSONS

# YOUR Q1 TRAIL GUIDE

This is your roadmap for moving through your Q1 climb.





# ROADMAP CALLS



Take Practice Diagnostic Assessment

Schedule via Calendly with Coach Lauren

1:1 Roadmap Strategy Call with Coach Lauren

GuideMap, TrailGuide, 1-Page Business Plan

1

2

3

4

GET CLEAR. GET FOCUSED. GET TO WORK.



# ROADMAP CALLS

## WHAT TO EXPECT



Bring copies of your 3-year vision, 1-page business plan, My Model Practice, Annual Calendar, Success Shifter

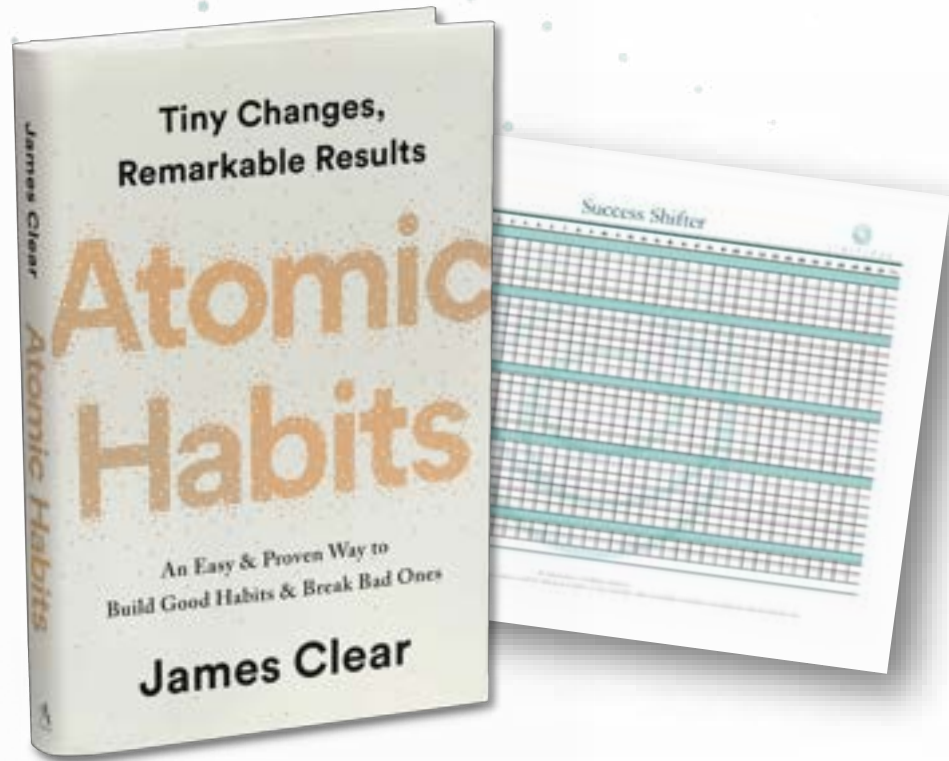
Together we will create your Guide Map for the year

After your coaching call, you will receive a link to tell us how we can best support you

If you are a Virtual member and need additional coaching support, sign up for Office Hours. If you are a live member, reach out to [coaching@limitlessfa.life](mailto:coaching@limitlessfa.life) to schedule call with a coach

Monthly Check-In Emails start in March. Let us know how you're doing!





# High Performance Habits

30-day success sprint

TO JOIN: FILL OUT OPT-IN FORM  
(SEE LINK IN CHAT)



ELEVATE YOUR THOUGHT HABITS



BUILD HPH BETTER BEHAVIOR HABBITTS



EMPOWER BETTER BUSINESS HABITS



STAY ON TRACK WITH YOUR TRIBE

L I M I T L E S S



CELEBRATE YOUR COMMITMENT TO  
BUILDING A WILDLY SUCCESSFUL PRACTICE

# WE WANT TO HEAR FROM YOU

TAKE YOUR RETREAT SURVEY

Look for a notification at the top of your event screen.

