

LIMITLESS Coaching Call Transcript

January 8th, 2024
Lifestyle Kick-Off Coaching Call

81
00:18:43.320 --> 00:18:44.900
Stephanie Bogan: Alright, let's kick it off.

82
00:18:45.010 --> 00:18:46.520
Allison Foulk: Ricky.

83
00:18:50.560 --> 00:19:10.340
Stephanie Bogan: Good morning, everyone happy. 2024. I'm Stephanie, and I am so excited to kick off this year's limitless coaching programs. I have the team and the coaches with me, and you'll get an opportunity to meet all of them shortly. We're gonna take just a moment to Gaylea. We're at 1001 here, my time.

84
00:19:10.340 --> 00:19:22.439
Stephanie Bogan: So I said, we have a lot of people joining so I hope everyone's New Year has kicked off with a bang, and that you were all prepared for a very wild fun and productive ride this year and limitless.

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00:19:22.670 --> 00:19:27.129
Stephanie Bogan: Alright. So let's go ahead. My screen clicking.

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00:19:29.140 --> 00:19:53.000
Adam Cmejla, CFP®: It's so. It's so interesting how things have changed while we give people time to join here. I'm looking at the in the in the participants side. I'm looking at everybody that's adding, if you'd have told me that 3 years ago we would have like a quarter of the attendees be someone's virtual note taker. I wouldn't have even known what you were talking about. And now it's advisors. Fathom note taker. It's fireflies. Note taker. It's

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00:19:53.000 --> 00:20:08.449
Adam Cmejla, CFP®: George I mean, I've seen George's notetaker where they just kind of create another avatar another moniker around. It's it's interesting how, which is, I think, just demonstrative of the fact that the only thing that's constant in life is change. And that yeah, I was just noticing that

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00:20:08.450 --> 00:20:12.539
Adam Cmejla, CFP®: little little little comical observation as we take off the year here.

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Stephanie Bogan: Yes, we all have trusty sidekicks that follow us everywhere we go, and I have to admit, 5 years ago I wouldn't have known what it was, but I would really hate to be without them. Now, it's



amazing how quickly we adapt to things that improve our lives and convenience, and they suddenly become right half to halves. And or I mean, who would wanna live without a phone or invite, you know, without their note taker or their assistant. Once you get one like, there's certain things that you really do hold on to.

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00:20:37.680 --> 00:21:03.480

Stephanie Bogan: Alright. We've got well over 100 1,520 people. So I think some other people will join. But in the interest of staying on time and making great use of yours. Let's kick off with that, everyone welcome. I am so excited to kick off limitless 2024 coaching programs. Today, we really wanna welcome you, the class of 2024. Give yourself a whoop. We do. What whoops around here?

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Stephanie Bogan: Well, cool. By the way, this is an interactive program, even though the summits are delivered virtually. And a lot of our calls obviously are virtual that does not mean that you will be turning off your camera and hiding while you check email and do 7 other things which we'll talk about so everyone. Please turn on your camera no one cares how you look, I promise if you're in the back I can't even see you. But it's really about being present and engaging fully to make the most of our day together.

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Stephanie Bogan: So you are the class of 2024. It's really your opportunity to build a wildly successful business and a life that you love. We'd love to talk about the building a million dollar 100 day off practice here at limitless. But note, I really don't care if it's we have clients who've gotten to 5 or 600,000 in revenue, and said I had no idea I could be this profitable. And I have this much time. I don't need to push to a million.

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Stephanie Bogan: We have clients who said they never wanted to get past a million who've gone on to build multi 1 million dollar firms.

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Stephanie Bogan: Your vision of what's possible and what you value will change as you move through the program. You move through your practice stages and you move through life. What I never want you to change or compromise on is that desire to build a wildly, not a successful, a wildly successful business, and a life that you love, and to me. When I sat down on the beach in Costa Rica, when I was retiring and thinking about what?

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Stephanie Bogan: What is it that I really do? How can I articulate what I'm trying to help people create? And it occurred to me that every client I've ever had, even clients have nothing to do with financial services. If you think about leaders, entrepreneurs anywhere

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Stephanie Bogan: we wanna live. Some version of what I've come to call the 5 Freedoms one. I want the freedom to work with purpose on my terms. When I started limitless my terms for 25 HA week from the beach in Costa Rica.

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Stephanie Bogan: Now they're home based in Park City, right? But I can co load, locate, and I still have an office on the beach right? If you need me to be in an office or to work past 3 Pm. Mountain time, we're not going to engage. And that's okay with me, because those are the boundaries of the guard rails that I've put in place clearly and confidently to know what my terms are. And the cool thing about it is, it doesn't actually limit your possibility. It actually

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Stephanie Bogan: actually steps it up. Which is part of that mindset shift. We're gonna help you step into this year. So a huge part of what you're gonna do, this first quarter in limitless is get really clear on what your purpose. And your terms are

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Stephanie Bogan: 2. We're gonna help you folks focus your energy and your time to work with people that you love. We we really spend a lot of time with our clients and our team. So we really wanna make sure those are powerful, positive, productive relationships or your energy on the work that you love and your team. Your time is your greatest revenue producing asset. Which means you wanna use it well. But you also wanna do things where you show up every day, and you're energized, empowered, and excited about what you do doesn't mean there are tough days.

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Stephanie Bogan: but that's entirely different than not being excited, being like, oh, I would love. I love everything I do except these things. We wanna teach you how to focus on the energy creating revenue, producing activities that give you energy. How to work with the people you enjoy turns out, if you do a good job of those things, you can enjoy an unlimited amount of financial abundance. There are right advisors making millions of dollars a year and huge companies. This guy really is the limit.

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Stephanie Bogan: and number 5 along the way. The goal really is, I think, for most of us to live a life of happiness, fulfillment, and contribution right and at limitless. We put all that together, and we talk about growing your time, your income, and your freedom.

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00:24:37.270 --> 00:24:39.340

Stephanie Bogan: Those are the 5 freedoms.

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00:24:39.360 --> 00:24:48.339

Stephanie Bogan: Each of you have some version of that what it means to you? If you didn't, you wouldn't be here if there wasn't a gap between you and that you wouldn't be here

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Stephanie Bogan: filling that gap is your big Y, which we'll talk about little bit later, and we'll certainly talk about it in the summit right? You should have heard about it in your pre work. You've gotta have a wide that's bigger than your what ifs because a lot of what ifs are gonna come up as you get clear, and you start to make changes and commit to a course of action

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Stephanie Bogan: when you get down or disappointed, or just plain. Wanna stop. Remember the 5

freedoms. Remember your big why? Because that's your compelling personal motivation to push through that resistance and create compelling change in your practice.

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Stephanie Bogan: Alright, we're gonna have an exercise a little bit later.

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Stephanie Bogan: Here's a sneak peek, and here's what I want you to know. Yes, there will be a quiz at the end of this conversation. which means we need you to pay attention. No email, no phone calls, no distractions, no multiple tabs, no checking your phone. You invested money and you'll invest more time, energy, and care into this program. Writing the check genuinely is the easy part. Let's make the most of this time. The number one set of questions we get around logistics. How do I turn this on? How do I link my calendar? Where is this? And I

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Stephanie Bogan: promise you, with all the love in my heart. We answered those questions 17 times in the emails that we send you.

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Stephanie Bogan: But you, like me, are busy. Don't love email and probably have the attention span of an app, which means we scan and go. Oh, we'll get to it later. And then later, we're like, where was that information? We're gonna go over all of it with you today. So that you're really clear on how limitless works, where to find what? Who to call for help, what the program structure looks like, what the agenda is, and most important part how to make the most of it.

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Stephanie Bogan: Alright, attention is a muscle, and this is your opportunity to practice building it

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Stephanie Bogan: alright. I am Stephanie Bogan, CEO, and chief possibility officer of limitless advisor. My goal is to really help you elevate your thinking, your methods and your mindset, so that you can elevate your work, your wealth, and your well being. We have an incredible coaching team with us this year. We have some visiting guests and faculty, and we have an awesome team that's here to support you. So I wanna take just a couple of minutes and have the coaches introduce themselves?

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Adam Cmejla, CFP®: Because they're a very important part of how limitless supports you as you create those new levels of success. Adam, do you wanna kick us off? Yeah, thank you, Stephanie. Appreciate everybody for being here, joining the program, returning and new members alike. This is an exciting time, for I just I love this time of year. I love kicking off the year with a sense of intention, with a sense of focus. I'm so excited for the work that we're gonna do together.

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Adam Cmejla, CFP®: My own journey through limitless has been dynamic right? I was in all of your seats at at and in 2,018 in the inaugural, the the

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Adam Cmejla, CFP®: the the the genesis of limitless right. And I've seen the progression personally and professionally, and certainly the financial implications of executing on a lot of the strategies that we're gonna talk about through this year. And I'm so privileged and grateful to sit now in the position as as an advisor coach and bridging that gap between concept and application of what we're gonna be talking about here today. The best practice and in practice, so my whole, like our goal, as we continue to go through the Round Table here, of introducing the team is

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Adam Cmejla, CFP®: to ensure that every one of you feels like this is an individual coaching experience, but at a group coaching rate, right? That you have, whether it's myself whether it's Natalie Liz, any of the subject matter. Experts that we're gonna be bringing in throughout the Co. Throughout the course of the year. We really wanna make sure that we're providing the resources and tools and applications to to help you. Be as successful as you want to be

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Adam Cmejla, CFP®: in your practice and in your life. And so my role as an advisor coach again just overarching. Think about the idea of well, how do I take the concept that I'm hearing. How do I take this and distill it down into what is my! I'm kind of coining this term. What's my nbs? What's my next best step? And then what's that action plan look like? So I love the

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Adam Cmejla, CFP®: taking the strategic part that we're talking about here. And then turning those into the tactical action items that we're gonna take. And again, I'm just so excited to to be here in multiple different ways those of you that joined my group or my my coach cohort. We have our introductory call after this, and I am just so unbelievably excited for what that

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Adam Cmejla, CFP®: cohort is going to be able to do to do together as well as a deeper community within the coaching program. So again, thank you, everybody for being here to the limitless team. I appreciate you. Thank you so much for all of the work that you've done behind the scenes up until this point, and that you'll continue to do to help

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Adam Cmejla, CFP®: us as coaches, as advisors shine in the program. So thank you again. Appreciate all of you very much. With that I will pass the proverbial Paton over to Natalie.

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Natalie Bergsma: Yay, I gotta go next, because I'm like next slide. I love it. No, it's so great to see all of you. I love seeing some familiar faces who are here and ready to kick it off again for a new year and really double down on execution. So I'm the practice coach in the program. That means I really focus on the implementation of the thinking and the tools and techniques

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Natalie Bergsma: that you learn here and limitless and can support you on that. So if you need accountability, if you're trying to figure out, what do I work on next? And and how do I execute it. I don't have



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Natalie Bergsma: the know how, but I need support. That's really where I come in. Everything from business, vision to management. I love to say that I love people in Hr. I know most of you here

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Natalie Bergsma: don't. So that's definitely one of the specialties that that I absolutely sin in. And I love, you know, processes and helping you execute. So whether it's tech systems and workflows? Right? What do we work on? What do we work on next? Those are really areas that that I come into play.

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Natalie Bergsma: The other thing I bring is if we're ever in a coaching conversation or call, and we're not stuck on the processes or the how to, but we're stuck on the mindset or kind of what's my next best step as a leader in the organization. I kinda have my foot firmly in both worlds, right, helping you as a leader, become your best self and helping you as a leader and your team execute. So that's what I'm here for, and with that I'll pass it over to the list, cause she's next on the list.

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Liz Hand, CFP®: How about the morning or afternoon depending on where you're from. I'm really excited to be here again this year with you. I was just reflecting back to my own journey with limitless, which started in 2020 when I hired the mindset coach outside of limitless and then started it in 2021.

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Liz Hand, CFP®: When I think about the five-year journey from 2019 to present day. Our firm has gone through massive change.

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Liz Hand, CFP®: I'm a gener a second generation adviser, and so where I was in the Bd land was not serving me, and so I moved our firm to a different broker dealer. Raa

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Liz Hand, CFP®: I've gone through succession. I've gone through a fee raise client downsizing I've sent those dear John letters to clients and if you haven't met me before, I'm like really warm and fuzzy, and I care a lot about what people think about me. So all of those changes that I've made required a new level of confidence

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Liz Hand, CFP®: clarity on what comes next, and the willingness to do the work. And so as the mindset coach, you are going to be going through massive change. That's why you signed up for this program, and my role is to help you when procrastination shows up. That's usually a main key for advisors. We advisers hate procrastination right?

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Liz Hand, CFP®: And procrastination is a cue for you that there's perhaps some head trash in the way of you actually implementing the thing that you need to do, because you know that you're an action-oriented person, and you can get stuff done



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Liz Hand, CFP®: when you set your mind to it. So if there's head trash in the way. That's a great time to reach out to me on tribe, or if you have the coaching pass, we can have that coaching call.

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Liz Hand, CFP®: and the one last thing that I wanted to say was, it takes 2 people to create a pattern.

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Liz Hand, CFP®: It takes one person to break a pattern. So if you know that there are

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Liz Hand, CFP®: some sort of dissonance happening for you in your office with another advisor, with yourself breaking that pattern. That's part of the mindset work, and that's what I can support you on this year. I'm super excited to support you and see you grow

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Stephanie Bogan: excellent. Thank you so much, Liz. We'll also have different points along the way. Michael Kitsis will visit us and our spend a day with us in the leaders program Bob Nakman, who I started with, I think, working with they're almost 30 years ago. I was in my early twenties will be coming to do one of our calls and spending a day with our leaders. They've gone through the entire growth curve all the way up to selling their 2 billion dollar firm

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Stephanie Bogan: to Cap Trust, and they started with 2 advisors and 2 support staff. Right? So really good insight onto that growth curve for those of you on the leader side. With some great insights for the inflection points that you'll go along to get to that 1 million dollar mark, and over and then we're always so honored to have Megan and Candace from Vicom. Come and do calls. We'll have some other guests they're really awesome. We just couldn't fit them all on the slide.

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Stephanie Bogan: so we'll be bringing in members to do peer shares, hey? This is something I applied. Here's how we did it, and the success that I had alumni who've had those same experiences right? Kathy Curtis Tanya who Taylor Schulte like just advisors who really created great levels of success. And then outside guests and experts on different topics. You'll also have the opportunity to interact with our fabulous team, Alison, our program manager who kicked us off on the call

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Stephanie Bogan: is here making sure that all of the everything runs behind the curtain, if you will. All the bells and the ropes and the pulleys we've got Leona, who's our program and events coordinator, who supports the program group and make sure that you have fantastic event experiences. Kathryn is our platform and operation specialist. So she makes sure that we can really leverage people processing platforms.

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Stephanie Bogan: Really, effectively, to deliver really deep and valuable client experience to you, and a hyper, efficient way, which is one of our big mantras here at limitless and Danielle Wells. You'll obviously



engage with Danielle a lot as you, and reach out to coaching inbox for service support, or any questions that you have so you'll have lots of opportunity to engage with the team over the course of the year.

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Stephanie Bogan: and you'll have a great support system. We talked about this in the marketing webinars, if you attended any of those. So there's really just everything you need to succeed here because we're gonna use strategies and principles that cover the 4 modes of mastery right? The 4 areas in your life you really have to excel at to hit those next level success, your mindset

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Stephanie Bogan: you're mapping right? Are we clear about where we're going and why? Otherwise, we're just spending right? A lot of energy and activity. But we're not necessarily making more than incremental progress. What are the methods? Right mindset is the biggest determiner in your success, but having a good mindset and bad methods is gonna really slow you down having a solid, empowering mindset and best practice method. It's like taking a rocket ship to the moon.

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Stephanie Bogan: Right? So the goal is to integrate those things and help you maintain your momentum, your state, your energy, right? You're feeling clear, conscious, empowered, focusing forward. Yes, I can, and I will, which is the state we want to operate in a lot more of the time. So every conversation we have, every topic that we have has those 4 modes in mind, and integrated into the conversation, the content, and the coaching, even though you won't notice if you're not looking for it.

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Stephanie Bogan: So the coaches are here. You've got the proven practices, all the tools and the training, and then some great accountability, and a tribe to take you to new heights. So you really do have all the ingredients that you need to succeed.

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Adam Cmejla, CFP®: So what I love about the beginning of limitless is that everybody is coming to the program at a different place in their life, personally and professionally.

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Adam Cmejla, CFP®: And what is just amazing about what

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Adam Cmejla, CFP®: we're at you, you join a coaching program like this for first timers that are here. And you're just like, Okay, there's a certain leap of faith that's being taken by joining this because you've heard me. You've heard, Stephanie. You've heard other advisors in their journey. But you're still trying to ask yourself

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Adam Cmejla, CFP®: like, Okay, but is this really for me? Is this really what I what is, gonna help me get to? Where I need to be or where I want to be.

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00:37:14.280 --> 00:37:36.289



Adam Cmejla, CFP®: So on behalf of all the coaches like. We understand that again, mostly directed towards first time members here, that that there's a leap of faith that was demonstrated, demonstrated by you in joining this program. What I can tell you unequivocally, though, is that by being here and writing the check which is the easiest part of the journey that we're gonna be on

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Adam Cmejla, CFP®: is.

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Adam Cmejla, CFP®: you will be as successful as you want to be, and we will support you to the extent that you allow us to support you. And so our goal here is to make you comfortably uncomfortable. Right? We're gonna throw around a lot of catch phrases. You'll start to learn them as

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Adam Cmejla, CFP®: atomisms or stephisms, limitless systems. We can just kind of put that on under the overarching theme here of, you know. Are you interested, or are you committed? Are you? You know your why must be greater than your what if you're gonna start catching up a catching on a lot of these phrases that we use. But there's a reason that we use them.

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Adam Cmejla, CFP®: It's because they work and because they're sticky, and because they empower you to do things that you didn't know you wanted or needed to do, to get you to a place that you know is possible. But yet you're just not quite sure why you're not there. And so where you are right now, in the experience that you've created is something that we're going to help walk with you through and take you on this path. And again, I know we have that 1 million press practice and freedom to enjoy it. There should again just be a big asterisk next to that.

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Adam Cmejla, CFP®: because it can be the experience that you want to create.

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Adam Cmejla, CFP®: And so show me your account. Show us your calendar. Show us your checkbook, slash your budget, and we'll show your priorities, and we'll help you again. Organize and prioritize both those things. So I'm again just really looking forward to not only the tactics, but the behavioral. The behavioral side of this. And that's what I really believe makes this program different, is addressing with people like Liz and Staff and myself.

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Adam Cmejla, CFP®: The mindset, the story that we're telling ourselves, the behavior on how we're showing up. We have to address that first, and once we address that now doesn't make everything else easy, but it sure makes it a heck of a lot easier than if we wouldn't have been adjusting for that in the very beginning. So again, just you're gonna hear this theme. We're really excited to be here today.

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Stephanie Bogan: Yeah, Christy, I need a copy of that 4 pages of stuff isms to add this point, right? We want you to stop wishing and start working, how to take those ideas and actually start to implement them is gonna be part of all of our conversations. Putting first things. First, we are literally going to give

you like a master's program and running a kick ass, advisory firm.

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Stephanie Bogan: And whether you're in limitless doing it on your own or somewhere else, you're not going to implement that massive change in 12 months. What we're doing is creating

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Stephanie Bogan: meaningful progress. And you can build on that at the pace in the way that you choose. But you're gonna implement one or 2 or 3 things big this year. If you do that, you're gonna get extra money's worth. And then some right? It is not gonna be in attacking 50 of them, getting frustrated and getting halfway through right? So you're gonna hear us talk about first things first a lot. And then, as Adam pointed out, it's show me your budget. You can tell me what's important to you, but you can show me your budget. You can show me your time. You can show me the clients you're working with.

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Stephanie Bogan: and I'll tell you what's important to you. Right? Are you more committed to creating new levels of success? Or are you more committed passively though it may be to to compromising and being complacent to being settling. And we're really excited that you're here, as you can tell, because it means that some part of your brain said.

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Stephanie Bogan: I'm ready to set down my BS. My belief systems and the other stuff, and I'm ready to stop settling and to step into that next level of success. And that is the key ingredient in making the magic happen. You have to commit. You have to choose and commit

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Stephanie Bogan: what the beauty of limitless is is, we understand how the architectural blueprint right? The what about this on this day. How many clients, what to charge? What do I say? When and how do I build it? Right? We've been doing this. I've been doing this for 27 years. Right? The advisors and the coaches and Natalie's been doing this for 20. The advisors have been in this for many, many years, and the idea is, what is that model for success? If you were gonna build an awesome firm in a box.

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Stephanie Bogan: what would the components be? And we've essentially broken them down into what we've come to call, and you know, is the 9. Success shifts

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Stephanie Bogan: right? From what we're doing to best practice. What's the optimal application of this concept in my practice. Not. I'm a cookie, and I need the cookie cutter. But here's the blueprint, the model, the template that's proven to work.

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Stephanie Bogan: How can I apply that in a way that will be optimized and get me the best results in my practice, and that is shift number one. To elevate your thinking. You hear us talk a lot about that. And it's not going to stop to model practice. What? What's the vision of what you actually wanna create. And let's get clear and specific about that. So that we can then translate that into action plans and business decisions that support that

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Stephanie Bogan: 3. We're going to talk about and teach you how to take charge of your time. If you do nothing else this year.

166

00:42:16.980 --> 00:42:41.369

Stephanie Bogan: this is the thing to focus on. It will change your entire world. For how to be a trusted advisor, how to communicate your value, how to quote your fees with confidence, how to really sit in that present conscious space and show up for clients in a really awesome way and feel good, knowing that everything else is being taken care of. And you're actually delivering a level of service you feel great about. You're not worrying about where it's all going.

167

00:42:41.440 --> 00:43:09.230

Stephanie Bogan: because you know how to package that value, which is the next shift. Right? We can package and present it or communicate it in clear, concise, and compelling ways. The front stage telling our story, our websites, right coi conversations. And then we have to implement that shift number 8, systematize your special. How do we use people process and platform that shift number 7 for success and number 8 to create leverage. How do we deliver more value

168

00:43:09.320 --> 00:43:28.920

Stephanie Bogan: in a lot less time, which allows us to do that thing? We all really say we wanna do and struggle to ever, really, quite get around to. And that is geared into our growth engine. How do we actually create Seti sustainable growth in line with our growth goals. That would if we know if we, the inputs are there, the outputs are gonna show up right? That is the Holy Grail of growth and marketing.

169

00:43:29.020 --> 00:43:42.489

Stephanie Bogan: And Adam can tell you right? You really can build it. If you build it, they will come. But you actually have to get the time, the energy right and the people and the investment capital to actually get that work done on your growth engine. And we tend to get distracted.

170

00:43:42.670 --> 00:43:56.979

Stephanie Bogan: So those are the 9 shifts we had. You start with some of those base camp learning paths right around vision and model practice to start to really think through, challenge yourself and identify where you have gaps, questions, or uncertainty about what it is you ultimately wanna build.

171

00:43:57.420 --> 00:44:08.130

Stephanie Bogan: This is our agenda road, map, our coaching roadmap for the year, if you will, we have those 4 virtual summits, performance, value, productivity and growth. I will not read off all the lessons.

172

00:44:08.130 --> 00:44:28.790

Stephanie Bogan: These are all in here will be in the program guidebook, which we'll get shortly but these are the lessons that we cover at each of the summits as you can look at. You're not going to be able to implement them all unless you were some kind of superhero, in which case go for it. But what you're gonna find, and that's gonna be really difficult to do, because we're giving you the lay of the land

173

00:44:28.840 --> 00:44:34.580



Stephanie Bogan: instead of saying, Hey, we're gonna make it year 1, 2, and 3, right? And we're gonna force you to be on that track.

174

00:44:34.690 --> 00:44:49.400

Stephanie Bogan: Now we're gonna show you the plan that we'll go through to help you turn that into your plan for this year. So Alison will share with you when we do the website where to find and get your program guidebook. But your guidebook gives you one a path. If you were, gonna start on a trail

175

00:44:49.450 --> 00:45:00.170

Stephanie Bogan: and do the lessons in order. No one ever does that, by the way. But if you were making that climb in that exact way, this is the path that you would follow. It's a really nice visual of the lessons that we'll cover

176

00:45:00.370 --> 00:45:10.160

Stephanie Bogan: there's a guide map. So you'll take a practice diagnostic which we're gonna talk about a little bit later in this call, which is, gonna give you a right, a a heat rating, if you will.

177

00:45:10.160 --> 00:45:32.819

Stephanie Bogan: on how you're doing in each of the core areas. Red, critical, right? Urgent need of intention. Danger will. Robinson must must fix this right yellow. We, it's we. We need to give it attention, but it's not dire. We need to deal with the reds first and then green, which is hey? We're pretty good on this right now. We get everything to green status. We can go back and optimize it, but we don't need to spend a bunch of time or energy here.

178

00:45:32.930 --> 00:46:02.269

Stephanie Bogan: and then you'll translate that into your guide map. So you know what critical wh, which of the lessons are critical for you? Which of them are important and which of them are not things you have to worry about, so that as we go through each summit via that plan that I showed you, you'll be able to identify Ian or Julie or Nick. Which of the lessons do you, you wanna you'll attend them all. So you get great learning knowledge that you can apply, but which ones are you going to apply this quarter to make sure you actually get the benefit

179

00:46:02.440 --> 00:46:18.549

Stephanie Bogan: right? Half of them not finished isn't nearly as good as one or 2 of them really finished and put into practice. And then we have the Summit roadmap Action plan at the end of each retreat or summit that will walk you through. So you'll do the practice diagnostic.

180

00:46:18.650 --> 00:46:29.760

Stephanie Bogan: You'll update your guide map in the guidebook. So Julie will look at this and she'll be able to see that she has 12 reds and 2, you know, 8 yellows and 4 greens, whatever it may be.

181

00:46:29.830 --> 00:46:32.809

Stephanie Bogan: And then, as we go through each summit.

182

00:46:33.210 --> 00:46:51.030

Stephanie Bogan: We'll have the guide at the end of each summit. So next Tuesday, when we get



together, our closing session will be what we call the Summit Action Plan, and we'll go through and help you process and digest and build your action plan for the quarter which will be based on one big priority. Big is and big, important goal.

183

00:46:51.320 --> 00:47:04.989

Stephanie Bogan: Right? Bridget, if you could do one really big thing that would move the needle this quarter, what's that? And then 2. What we call progress priorities is time alike. If you can get through one and get to the other 2 fantastic. But we have to make sure that the big gets our attention.

184

00:47:05.180 --> 00:47:19.560

Stephanie Bogan: and then at each summit you'll create an action plan based on what you learn and what your next 3 to 5 big steps are that make sure you have those next steps, so your brain doesn't leave Summit going. I don't know. I don't know turned your brain off most of the time.

185

00:47:19.690 --> 00:47:35.930

Stephanie Bogan: Hey? I've got at least one next step that I need to figure out how to take action on is 80% of the of the work to making things happen, and then you'll have the website tribe obviously coaching support to help you right, get answers to your questions, customize those solutions and get feedback as you go.

186

00:47:36.100 --> 00:48:01.919

Stephanie Bogan: So hopefully. That gives you a good overview of how will help you personally execute the agenda this year. So the program map really lays out the curriculum and the path that will take to get there. The di, the practice diagnostic, the guide map and the action plans are really your personal path through the program. So you know where to focus your time, energy, and attention to get the best results this year.

187

00:48:02.430 --> 00:48:09.589

Stephanie Bogan: If you have any questions, we'll take those at the end or drop them in the chat, and we'll see if we could get those cleared up. But hopefully, that gives you a good overview.

188

00:48:09.780 --> 00:48:33.769

Stephanie Bogan: This is what the service model calendar. One thing we'll teach you how to put together this year looks like we're obviously gonna do our core learning through our core summits. And then based on this legend, here you can see we have a peak practice coaching call where we are not giving you new lessons per se. But we're unpacking. Hey? Let's talk through this timeline. Let's figure out what holds people up. Let's talk through the fixes. Let's have people who've done it

189

00:48:33.770 --> 00:48:51.719

Stephanie Bogan: successfully, share or bring it an outside guest. It's really expanding and adding, and you'll get lots of ideas and insights that you can implement little things along the way that'll add a lot of value that are in no way right structured into the curriculum. You just get a lot of that through the conversation. The connection and the collaboration

190

00:48:51.890 --> 00:49:20.689

Stephanie Bogan: second call of the month is our peak personal peak coaching call. We like to call that the mindset call Liz leads those I'm usually on about once a quarter, and they are fantastic. Our members



in our member survey every year rave over them. This is as Liz pointed out, where to go. If you get stuck or stalled, I'm procrastinating, and I don't know why I know I need to think about this fee raise, and I just put it. I like I'm just avoiding it or I can't. I shouldn't. I don't know, like those things that stuck you or stall. You

191

00:49:20.690 --> 00:49:42.029

Stephanie Bogan: are great things to bring to those calls, and those are the kinds of things that will direct you to bring to calls when we do the quarterly check-ins, lifestyle office hours is come. One. Come, all. Ask any questions. You have lots of people come just to listen to the questions that other people ask, which is great cause you'll learn a lot. It's also awesome to come with a question. I promise you. There is no point in this program

192

00:49:42.030 --> 00:49:57.229

Stephanie Bogan: at which there will not be one good question that you could ask that would add value to you. Help you get clear help, you get focused, help you move forward in some way that moves the needle just a little bit. So really, the invitation on these calls is when we ask you if you have questions.

193

00:49:57.230 --> 00:50:18.229

Stephanie Bogan: or if you want to do an on the spot coaching, or you want to give a peer share. That's the place to, even though it might be uncomfortable, really jump in and take advantage of those opportunities. So you can see the call schedule. Here we have our 4 virtual summits and then our leaders retreats that back those up in the spring and fall. And then our leaders epic Everest events in May.

194

00:50:18.700 --> 00:50:20.470

Stephanie Bogan: And for those of you that are in leaders.

195

00:50:20.950 --> 00:50:37.089

Adam Cmejla, CFP®: Here's how we're gonna support you as you execute the program. And Adam is. Gonna tell you all about it. Yeah, distilling it down to one more layer. Right? This is we. We break the program down into weekly interaction. So week. One, the peak, the peak practice call

196

00:50:37.090 --> 00:51:00.830

Adam Cmejla, CFP®: that is going to be a 90 min call. That's going to be what we would consider to be the best practice, right? That's where we're gonna be covering the different topics that we've shared with you already on the different paths or the different journeys that we're gonna be on the office hours week 2. You had a week to digest the lesson. Go in, look at some of the supporting collateral resources, guides, templates, etc. But you still have questions. Great show up for practice hours or show up for the peak

197

00:51:00.830 --> 00:51:22.259

Adam Cmejla, CFP®: practice office hours again. That's 60 min. That's gonna be the second week the personal peak coaching call. That's where I'll be involved as well on just a little bit more of the personal side of things where, as you know, Liz will be involved in that, the mindset coaching piece of it, addressing the the, the dangerous place between our ears right, making sure that we

198

00:51:22.260 --> 00:51:39.950

Adam Cmejla, CFP®: personally are showing up in the best possible way to execute on what we're



talking about through the program. So that's going to be week week, 3, and then week 4 for those of you that have opted to join my coach cohort, which again, is a deeper dive. The the 2

199

00:51:39.950 --> 00:52:03.669

Adam Cmejla, CFP®: qualities. The qualities that I'm bringing into the coach cohort are clarity and accountability like at the end of the day. Those are the driving forces of what we're going to be accomplishing to the cohort, which is, are you clear on what your nbs is right? What your next best step is? And then, from a cohort standpoint, we're gonna have some pretty transparent and direct accountability with everybody in the cohort. So we're gonna be meeting on a weekly basis.

200

00:52:03.670 --> 00:52:27.899

Adam Cmejla, CFP®: In addition to that, we're gonna have quarterly check ins throughout the entirety of the of the coaching program. You'll get those via email for those of you that opted into the personal coaching pass again. That is a member. Only option. You'll be able to schedule periodic quarterly calls with myself, with Liz, with Natalie, with Stephanie. Whoever it is that you decide that you are best looking for guidance from, you'll have that

201

00:52:27.900 --> 00:52:52.629

Adam Cmejla, CFP®: additional opportunity to connect with us in a one on one capacity for my advisors, or for the advisors that are in my coaching cohort. I have also created one on one there, essentially 25 min blocks of times every single Monday for us to have additional one on one time. Again, if you're looking for just an additional nudge, an additional point of clarity, additional level accountability. So I'm also opening up for my advice for the advisors that are in my card

202

00:52:52.630 --> 00:52:59.379

an additional sense of, or an additional access to one-on-one. And then last, but certainly not least. There's the good vibes tribe

203

00:52:59.600 --> 00:53:23.750

Adam Cmejla, CFP®: that is our community. Our message board call what you will, but the good vibes tribe is our online community. That we have. What I would recommend to you is you will, or what I'll recommend and also share from a point of personal experience. And like I said, I, you'll get like I said a couple of slides ago. You will get out of this program what you put into it what I have found to be

204

00:53:23.830 --> 00:53:33.409

Adam Cmejla, CFP®: 2 very related qualities that I've observed for myself. And actually, I just recorded a podcast episode on my podcast on 2020 money, with a guest.

205

00:53:33.440 --> 00:53:36.940

Adam Cmejla, CFP®: on the qualities of resilience and vulnerability.

206

00:53:37.420 --> 00:53:49.870

Adam Cmejla, CFP®: And I don't believe that either one of those can exist in a vacuum. I think they are symbiotic virtues that are relational to one another, that my point with that is the point at which you become most vulnerable.

207

00:53:49.870 --> 00:54:11.200

Adam Cmejla, CFP®: You will see the greatest sense of progress in this program, and you will also likely be faced with an additional level of resistance which will require resilience to push through, and what I can say about the good vibes tribe is that there is no better place to have a community of other like minded advisors. We're all here

208

00:54:11.310 --> 00:54:29.470

Adam Cmejla, CFP®: for a reason, abiding by a set of principles that we have communicated to you prior to you joining this program. So this is a safe space. The good vibes tribe. You will get out of that community out of that forum, out of that tribe. What you put into it, speaking as an advisor. If my put my if I remember putting myself

209

00:54:29.470 --> 00:54:43.720

Adam Cmejla, CFP®: in that situation in 2,018, Steph, you recall the exchange, the back and forth that we had. That was a sick. I downloaded that entire conversation, and it is 16 pages single spaced word document! That was my

210

00:54:43.780 --> 00:55:09.130

Adam Cmejla, CFP®: like clarity, moment, and documenting and journaling and sharing with the entirety of the of of the of the community. Right? This wasn't a one on one email or a one on one message to Seth. It was, I'm gonna put myself out there to everybody. And not only did I get great feedback and perspective and coaching tips and and strategies from Steph, but I got it from other advisors, from other people that have been there. So the good vibes tribe, if you're not

211

00:55:10.090 --> 00:55:32.010

Adam Cmejla, CFP®: returning members. If you haven't engaged in the in the, in the tribe, I would really encourage you to put yourself out there, figuratively speaking, in in a in a digital form in the good vibes tribe. We've got a lot of lurkers. We have the data. We can see how many of you log in, and when you log in, and how many times. But I really wanna emphasize the importance and the benefit that the good vibes tribe can be

212

00:55:32.010 --> 00:55:52.089

Adam Cmejla, CFP®: administrative point that I'll close with here if you have something that you want to make sure one of us sees. Just use the at symbol, right at staff at Adam, so that we get tagged in that, because, as we'll talk about from managing our time and managing distractions, I don't get email notifications when when you

213

00:55:52.250 --> 00:56:15.980

Adam Cmejla, CFP®: when you tag me, I have a predetermined time on my calendar that I get into tried to check to see where I've been tagged, but I don't see every post. If you ask me a question, just make sure that you add myself that you add steps that we get tagged in that post, and I promise you we will go in there and help and and provide resources, and and provide you with your next best step is so that hopefully gives you some clarity around the coaching center in the various different ways in which we're here to support you.

214

00:56:16.240 --> 00:56:38.960

Stephanie Bogan: Yep, the really cool thing about tribe to Adam's Point is, you'll literally you'll post a letter or an email, and one of us will rewrite it, or your peers will be like. Oh, here's the one I use last



year. Just go ahead and borrow it like there's so much good stuff there the other cool thing is. If you've got an issue or a topic, a practice topic we would leave past posts in there.

215

00:56:39.210 --> 00:56:50.020

Stephanie Bogan: So we have probably answered how to look at profitability, or my service model, or how to tell my story? Or could you do a website review 150 or 300 dimes at this point.

216

00:56:50.020 --> 00:57:13.549

Stephanie Bogan: So there's some great stuff. If you go back and look at how I reviewed someone else's website. It's pretty easy, pretty pretty easy to look at yours and go. I did the same thing. Here's how I fix it. Or oh, that stuff about, you know. Profited clients actually having to be profitable, that that actually does apply to me. So there's a lot of great stuff you could literally, we could turn. We should turn it into a book. If nothing else, social media posts.

217

00:57:13.800 --> 00:57:17.099

Stephanie Bogan: So there's some great resources there for you to access.

218

00:57:17.830 --> 00:57:42.519

Stephanie Bogan: And you'll access all of those through the website retreat workshops, as you know, from your registration materials, or 3,000 outside of the limitless 2,700 for you personal coaching pass. If you didn't get that and you decide you want one later. You can just let us know. And Adam's cohort is an additional \$300 a month. If you want the additional calls support and personally support so just a quick footnote on that

219

00:57:42.590 --> 00:58:06.240

Stephanie Bogan: all of that is delivered via this calendar, which you should have gotten a copy of you. Got your wall calendar and you should have the calendar invites in your right. The link to calendar invites, so you can upload all of those to your calendar. The instructions are there in great detail. If you have any questions after reviewing the instructions, notice, I said, after reviewing.

220

00:58:06.240 --> 00:58:15.009

Adam Cmejla, CFP®: Then the team is more than happy to help you. This is not me being lazy. This is right. Us really making sure that you're taking the time

221

00:58:15.010 --> 00:58:37.499

Stephanie Bogan: to pay attention to the things that we send you. We don't send you anything that you don't need to look at or read. We really make a point not to send you fluff emails. When re enrollment season comes, those come from a different address. So you can choose to ignore the marketing. If you want inbox insights and emails from us contain the information you need to really access and make use of the program this year.

222

00:58:38.140 --> 00:58:40.630

Stephanie Bogan: Allison's going to share a little bit about how you can do that.

223

00:58:41.090 --> 00:58:56.239

Allison Foulk: Alright. For our team members. We are super happy to have you participating this year.

The main space that team members engage with limitless is through the good vibes. Try so on, tribe. There are 2 spaces that you'll want to join. The first is team talk staff.

224

00:58:56.250 --> 00:59:21.230

Allison Foulk: and that is where your your cheat sheet is, which has all the links to your zoom lessons as well as the calendar. There is also the team member event space, which is where we will post all the zoom links for the events. So if you want to attend a summit you would just join the event space, and then you would have all of the links there, so you can follow along with your advisor. So make sure if you're a team member, you join both of those spaces.

225

00:59:23.630 --> 00:59:25.210

Allison Foulk: Okay? Excellent.

226

00:59:26.420 --> 00:59:35.520

Stephanie Bogan: Just general summary, right? Questions. You can email coaching at limitless fault life you can. You'll get coaching support through the practice calls

227

00:59:35.530 --> 00:59:40.259

Stephanie Bogan: the personal mindset calls monthly office hours tribe community. And

228

00:59:40.840 --> 01:00:07.769

Stephanie Bogan: I cause. I don't think I mentioned it on the slide earlier you will receive quarterly check-ins from us. So you'll get an email from me asking how you're doing. We're gonna ask you some very specific question, what's working? What's not, or where you challenged or stuck Natalie. And I actually review all of those, and we'll write. Give you a high 5 point you to direction or feedback. If you need clarity on what to do next. We can help with that.

229

01:00:07.860 --> 01:00:17.639

Stephanie Bogan: If you're a coaching past member, you'll have the option to just request a quick accountability call. If there's things you want to check in. So that's available to you. And if you are a general member

230

01:00:18.090 --> 01:00:29.489

Stephanie Bogan: and you have, what we will do is if Julie emails and she's really stuck on something, and Natalie reviews it and says, Hey, we really need to dive into this. It's not a like a 2 min thing.

231

01:00:29.650 --> 01:00:33.480

Stephanie Bogan: We will direct you to come to one of the coaching calls.

232

01:00:33.860 --> 01:00:56.519

Stephanie Bogan: not the kind of director. Julie will not in the email and say yes, and then not show up ready to have the conversation like direct you, and put your name on the list, so that as we have those coaching calls right, we'll we're really aware that Julie has an issue and will kick off those calls, particularly the mindset and the office hours calls, because that's what they're for there to process and problem solve.



233

01:00:56.520 --> 01:01:11.240

Stephanie Bogan: That's what they're for. Now we will cover some cool mindset, expanding topics like self-talk for success and overcoming overwhelm and relationship to money like we've got 3 or 4 that we just really love sharing cause. They're just such a cool up level.

234

01:01:11.320 --> 01:01:27.049

Stephanie Bogan: But your your, your mindset calls in your office. Ca, and peak practice calls to around specific practice issues. But it's really about making sure that you get that and question or that next step clarified so that you don't stop. Just you have that next best step

235

01:01:27.830 --> 01:01:40.080

Stephanie Bogan: if we direct Julie to that call, and she comes and then we get into it. And we're like, Wow, this is right deeper. Let's really find a way to solve this. Come to this next call, or Hey, why don't you talk to Liz?

236

01:01:40.700 --> 01:01:51.110

Stephanie Bogan: And then we cannot get Julie on stack. We will have a call with Julie. We will get you unstuck. We're not gonna be like yo. You did everything, and you're on your own bumper for you.

237

01:01:51.180 --> 01:02:01.749

Stephanie Bogan: What you heard me say, though, is, you have to show up and do your work. I would love. I so asked this team. I would love to talk with every one of you every week or every month

238

01:02:01.750 --> 01:02:26.730

Stephanie Bogan: per year for the \$9,000 that this program charges. But that would be insane from a business perspective. We just wouldn't be able to do it right. We're delivering a massive amount of value to you, and we have a lot of ways for you to use it, and as long as you use it there will be moments where your stock is stalled out or you're stressed out about something, and we have 4 different places for you to go to get help. And if you do try to

239

01:02:26.730 --> 01:02:31.359

help, and one of us needs to unstuck you. We will jump on the phone with you and unstuck you.

240

01:02:31.460 --> 01:02:43.630

Stephanie Bogan: The only way that you can get stalled or stuck in this program is by not raising your hand, not interacting and not engaging like you have to intentionally go out of your way to not engage

241

01:02:43.720 --> 01:02:53.440

Stephanie Bogan: like we've really designed it to work. And we have lots of those success stories that you see, we don't make them up. They're incredibly real, and it just gets better every year.

242

01:02:53.730 --> 01:03:01.630

Stephanie Bogan: so you can always get coaching, content and resources in the Member Library, which Allison's going to show you right now.



243

01:03:02.820 --> 01:03:23.260

Allison Foulk: drum roll, please. Thank you. I'm super excited to show you some of the things that you'll be using a lot throughout the year. So the Member website tried your practice diagnostic to name a few deck. I think you have control this slide now, if they can go ahead and move forward for me.

244

01:03:23.350 --> 01:03:34.390

Allison Foulk: Alright, perfect! The limit, limitless member site is where you're gonna spend a lot of your time and how you're going to engage and download all the resources and lessons that you need for the year.

245

01:03:34.530 --> 01:03:53.029

Allison Foulk: The left hand sidebar is what you'll have access to on the site. So I'm just gonna walk you through a few of those. If for some reason you have not finished downloading your forms and filling them out and sending them to us, you can click on the forms button there and fill out either your enrollment or you're getting started. Form.

246

01:03:53.030 --> 01:04:19.710

Allison Foulk: You can also add a team member here which some of you have already completed, or you can do any of the account things that you may need to like billing for the coaching center. This is where your coaching calls will be recorded and posted on a bi-weekly basis. So those week, one and week, 3 calls. If you happen to miss one, it's not a problem. You'll just go to the coaching center on the website, click on coaching calls and be able to access it there.

247

01:04:19.880 --> 01:04:42.199

Allison Foulk: If you're a coaching pass member, you'll be able to click on the coaching. Pass page, watch a video of the coaches and see what they specialize in and then be able to schedule your one on one call with them. The practice diagnostic is also accessible here, and you'll see your results, which I'll touch on in the next slide, and you can reach out to us for support if you need that.

248

01:04:42.480 --> 01:05:09.810

Allison Foulk: Next is the learning center. The learning center is where your lessons are and your learning path, and also you can access the limitless library where all of our abundant resources live. At our events, you'll also be able to click on the retreat button and be able to retroactively go through and see all of the event recordings. So if you miss an event and you wanna be able to attend it after the fact. You can go to this portion of the website to see that

249

01:05:09.950 --> 01:05:27.529

Allison Foulk: last 2 items we have here is a good vibes. Try which I'll touch on in a second, and the Member Directory, if you want your fellow limitless members to be able to find you to look you up. If see if you're in their city or their state, or get a group of people together that may have the same niche.

250

01:05:27.530 --> 01:05:40.319

Allison Foulk: be sure to visit the Member Directory page and fill that form. This is just what you want to share with other limitless members. So it's super helpful that you guys can connect to each other and see that on the Member Directory page.

251



01:05:40.580 --> 01:05:43.889
Allison Foulk: Alright. Next slide, please.

252

01:05:47.570 --> 01:06:10.410

Allison Foulk: There we go. Okay. One of your assignments, for after this call today is going to be to take your practice diagnostic. You heard Stephanie talk about this. If you attended one of the Webinars, and it's a really helpful tool that we have on our website. There are 13 categories, and you will rank yourself on a scale of not at all true to always true in several different areas.

253

01:06:10.410 --> 01:06:33.979

Allison Foulk: and then we'll give you a heat map that will let you know which areas you're doing. Great. You're green on your middle of the road yellow. Or you really need to work on red these areas, a map to our learning map learning paths on the website. So if you find yourself red an area that you think is really important. For example, taking control of your time, you could then go to the website

254

01:06:33.980 --> 01:06:47.240

Allison Foulk: learning path, taking control of your time and dive into those lessons there. So this is a super helpful way for you to just get a pulse on where you are holistically in the program and what you need to work on.

255

01:06:47.460 --> 01:06:49.800

Allison Foulk: Okay, next slide.

256

01:06:50.570 --> 01:07:12.320

Allison Foulk: Alright. This is one of my favorite parts of our website, because I am very passionate about all of our wonderful lessons and resources reading and action items that live in the learning center and the learning center. There are 3 areas that you're really going to be using. There's the lesson page, the Learning Path page and the library.

257

01:07:12.320 --> 01:07:20.609

Allison Foulk: And here are the 3 use cases for each. Say you're attending a call, and Stephanie mentions a resource like above the line.

258

01:07:20.740 --> 01:07:29.229

Allison Foulk: You know. You want to download this, and you want to use it. So you would go into the library, and you could just type in the name of the resource, download it and use it

259

01:07:29.560 --> 01:07:51.200

Allison Foulk: pretty easy. If you hear a lesson, you know the name of the lesson, you can go to the Lesson Page type the name of the lesson, and you'll have access to the recording slides. Transcript audio. You'll also have action items, resources and reading list there. So be sure to click on each of those tabs to be able to access those

260

01:07:51.320 --> 01:07:58.550

Allison Foulk: after you're done with that lesson, you can mark it complete and it'll show up on your program outline as complete, free for the year.



261

01:07:58.700 --> 01:08:28.660

Allison Foulk: Now, the third way to access limitless content is my favorite, and the one I would suggest using. It's by going to the Learning Path page what learning paths are are collections of our lessons by topic. So if you are interested working on your niche, but you're not exactly sure which lesson you wanna dive into, you would go to the nailing your niche learning path. This learning path includes beginner trail head lessons, and it includes advanced client lessons.

262

01:08:28.660 --> 01:08:51.940

Allison Foulk: So, no matter where you are. If you're wanting to focus on a beginner lesson, you would start on the nail in your niche lesson. But if you watch that last year, and you're in your second year of limitless. Maybe it's time for the marketing to your niche lesson. So this is a great place to go on the site where you'll get an overall view of the topics that we have, and you can see which ones interest you that way. I

263

01:08:52.259 --> 01:09:04.099

Allison Foulk: would definitely recommend doing that as opposed to going to the left and page, because it can be a little overwhelming to see 100 lessons. So learning path. Page is your sweet spot. Stick to that.

264

01:09:04.109 --> 01:09:21.950

Allison Foulk: map it with your practice diagnostics. See what you've ranked yourself low on, and then go to the learning pack page and look at those lessons there. That's going to be the most bite size, way of approaching the curriculum in conjunction with the Retreat Action plan that Stephanie mentioned that you'll get after each summit.

265

01:09:22.240 --> 01:09:24.819

Allison Foulk: Alrighty next slide.

266

01:09:28.189 --> 01:09:38.229

Allison Foulk: Okay? The next thing that is on the left hand sidebar is the good vibes. Try. Steph and Adam have talked about this briefly, just a few minutes ago.

267

01:09:38.229 --> 01:10:03.170

Allison Foulk: So this is where you will engage with all of your fellow members and your coaches. We have several different categories on the good vibes tribe. We have coaching center. We have a leaders only space. We have topic rooms, and we have member room. You're very welcome to start your own space as well. You just need to let us know what's missing, and we'll add it there. This is where, if you you say you watch the finding your

268

01:10:03.170 --> 01:10:20.169

Allison Foulk: lesson, you download the resources. You read the guidebook, and you're halfway through working on something, and you find yourself stuck. You can post on tribe what you're working on. Share a resource and ask for feedback on it from anyone else who, you know, might be working on it, or from a coach.

269



01:10:20.180 --> 01:10:38.099

Allison Foulk: This is a great way to get real time feedback. You'll find that other members are very responsive and very collaborative. We're happy to share what we're working on and get feedback on it. So really dive into tribe. It's going to be a great place for you to spend some time.

270

01:10:38.450 --> 01:10:41.800

Allison Foulk: Okay, I think I have one more slide

271

01:10:42.840 --> 01:10:53.379

Allison Foulk: alright the big Y form. This is under form, and this is how you are going to let us know what your big Y is and what your top 3 goals are for the year.

272

01:10:53.380 --> 01:11:15.000

Allison Foulk: So there are 2 action items that you need to complete as email to you earlier, as part of your onboarding. The first is filling out your big, wide form. When you fill this out on the site, we're gonna put this on your personal home page that way throughout the year. If you need to reor, reorient yourself to your goals or to why you're doing this work. It's gonna be right there on your homepage.

273

01:11:15.000 --> 01:11:36.079

Allison Foulk: The second is, share your big Y with your tribe go into tribe, click on the big Y room and share it with other people. This can help inspire you. Maybe you'll borrow some of their big Y and put it into yours, and it can just help give you a little bit of extra momentum throughout the year. So those are your 2 big y action items to complete after today's call

274

01:11:37.430 --> 01:11:38.660

Allison Foulk: alright.

275

01:11:41.530 --> 01:11:44.719

Allison Foulk: And that's it. That's it for me back to you.

276

01:11:46.820 --> 01:11:48.230

Allison Foulk: Oh, you're on mute.

277

01:11:51.730 --> 01:12:02.510

Stephanie Bogan: You'll notice from the screenshots that Alison showed you of the website there. It's not terribly complicated. There's an account section, a coaching center, a learning center and a try

278

01:12:02.760 --> 01:12:16.140

Stephanie Bogan: right? So everything you need will be there. If you take just a couple of minutes to explore it, you'll get the hang of it rather quickly the number one issue that we get emailed about for support around tribe is, where do I find? Fill in the blank?

279

01:12:16.190 --> 01:12:30.729

Stephanie Bogan: If you want to find the time lesson, and you don't remember the exact name. You can type time in the keyword and make sure that lesson is clicked order ordering up that references that but



also, like all search engines, it's a little bit quirky.

280

01:12:30.730 --> 01:12:46.860

Stephanie Bogan: If you but if you have the keyword you should be okay. If you have a keyword and you can find something it means at some point. I gave it a really cool marketing title, but not an easy to find title which Alison reminded me. And we're remedying as we go. But just email us, and we'll be happy to help you find it

281

01:12:47.390 --> 01:12:54.500

Stephanie Bogan: at. You should have by now received your welcome package, which includes your 2024 wall calendar. Everybody get one of those.

282

01:12:55.860 --> 01:12:58.530

Stephanie Bogan: We're gonna walk up the same part woop, boop

283

01:12:58.610 --> 01:13:08.479

Stephanie Bogan: if you didn't. Let us know. Sometimes shipping in the Us. Postal service just takes their time. But if they you haven't received it, let us know, so we can see if we can help you track that down.

284

01:13:10.750 --> 01:13:16.869

Stephanie Bogan: I did not touch my screen. That did happen. I swear that happened all by itself. That was crazy.

285

01:13:17.050 --> 01:13:31.890

Stephanie Bogan: So you've got your calendar. Your calendar marks off your limitless summits workshops, leaders, summits and retreats. Obviously, you see, all those green shades. Those are ongoing calls. Has anyone already calendered their time off

286

01:13:32.190 --> 01:13:33.630

Stephanie Bogan: for 2024?

287

01:13:34.710 --> 01:13:44.770

Stephanie Bogan: That is not Adam. Thank you so much. Anyone, Marianne, did it awesome. Everyone give Mary Ann a double high 5 and a whoop. Whoop!

288

01:13:45.240 --> 01:13:58.859

Stephanie Bogan: Alright! This is one of the most important things you can do. Remember, this is a doing program, not a listening or a reading program. You were tasked with setting up your 2024 calendar in more than one of the emails. And certainly when you got it

289

01:13:59.100 --> 01:14:13.399

Stephanie Bogan: so I would like you to all commit to putting something on it by the end of today for your out of office just as a step one, if you don't have. If you're not ready to map the whole year, you've got the next rate. We're gonna attack that at Summit.



290

01:14:13.410 --> 01:14:19.750

Stephanie Bogan: But can everyone commit to putting base level time off on the calendar by end of today?

291

01:14:20.980 --> 01:14:23.869

Stephanie Bogan: I'm looking for nods, thumbs up

292

01:14:23.890 --> 01:14:26.179

Stephanie Bogan: verbal affirm. All right. Good! Good

293

01:14:26.350 --> 01:14:37.650

Stephanie Bogan: put it on a post it and put it on your computer and find your no matter what which means you don't leave until, even if leave means, go downstairs until, no matter what it's done.

294

01:14:37.830 --> 01:14:44.949

Stephanie Bogan: This doesn't have to be your dream time off calendar, but I want you to put that minimum of 2 to 4 weeks, depending on what your minimum is

295

01:14:45.080 --> 01:15:01.350

Stephanie Bogan: if you want to put an additional time. But like you're you're in the growth mode. Then block off growth weeks right? Instead of taking 6 weeks vacation. Take 2 weeks vacation and block off 4 growth weeks. You'd be amazed at how much you can get done if you shut the doors and focus on marketing and growth for a week.

296

01:15:01.990 --> 01:15:24.949

Stephanie Bogan: Alright, and you got some cool post. It's I've got mine here because you're gonna hear us talk a lot about putting posted on your computer, reminding yourself right? Your intentions for the week or your affirmations. Post. It's our fantastic for that. And they remind you that you're in limitless and recollect a lot of what you we learn here when our brain see those symbols so good to just have a bit of those limitless pad of those limitless post. It's on your desk.

297

01:15:29.780 --> 01:15:41.469

Adam Cmejla, CFP®: Alright sorry. This is the first time it's happened, Steph, I'm interacting and chatting with someone answering some questions. And then I look down to the slides and see lower North lower end corner. Okay.

298

01:15:41.730 --> 01:15:44.220

Adam Cmejla, CFP®: we've covered a lot thus far.

299

01:15:45.170 --> 01:16:01.840

Adam Cmejla, CFP®: as you know. When Steph jumped in after Alison had talked through kind of everything she I heard what I what I appreciated, what Steph said is it boils down to 4 things you've got, tribe you've got like she just kind of distilled all that down into the couple of different areas that you're going to spend your time.



300

01:16:02.010 --> 01:16:27.810

Adam Cmejla, CFP®: I would like to say, take that same approach and say that this entire program can be boiled down into a couple of key traits to just keep in front of you, literally or figuratively I've got 3 different post-its that are taped onto my desk. One of them needs to get updated for 20 twenty-four's numbers, which are already set. But my first one is from my sense of accountability. It says, Am I doing a crutch activity?

301

01:16:28.150 --> 01:16:41.739

Adam Cmejla, CFP®: Am I doing something that is distracting me or inhibiting me from moving the needle and moving a rock that's on my calendar, right? So that's the get organized part of this. The other ones are a little bit more process, driven beyond the scope of what we're talking about here today.

302

01:16:41.910 --> 01:16:50.089

Adam Cmejla, CFP®: But this entire program can be distilled down to a couple of things that I would ask and encourage you to keep in front of you

303

01:16:50.140 --> 01:17:03.140

Adam Cmejla, CFP®: don't become overwhelmed. It can be easy when you jump into the program and you log in. And you see that there are all these lessons, and all these tools, and all these guidebooks, and these templates, these best practices and scripts, and

304

01:17:03.350 --> 01:17:06.019

Adam Cmejla, CFP®: etc., right like

305

01:17:06.470 --> 01:17:25.550

Adam Cmejla, CFP®: short circuit. What the heck do I do now? And what did I sign up for it, please? I promise you do not get overwhelmed. The path will show itself as you start putting into the work. And as you follow this journey that we're gonna be on together, there's a very incredible there's there's a very real sense of intention

306

01:17:25.800 --> 01:17:47.180

Adam Cmejla, CFP®: as to why we've laid out the program the way that we've laid it out. It is a domino effect. One begets the other, etc., etc., like Step, like Steph talked about earlier in this call. So don't get overwhelmed on all of the information that's there. We put that in there, so that you have access to those arrows in the quiver, if and when you need them. But don't feel like you have to figure all this out on your own.

307

01:17:47.240 --> 01:18:06.029

Adam Cmejla, CFP®: We got you. We'll take care of you. Do get organized right? And that's where the practice assessment comes in. That's where, as Peter Drucker, like your modern father, or a father of modern day business management, right? What gets measured gets managed and gets managed gets improved. So you have. If you want to improve something

308

01:18:06.130 --> 01:18:10.460

Adam Cmejla, CFP®: we have to first understand where we are at. So we do have to take inventory



309

01:18:10.760 --> 01:18:27.089

Adam Cmejla, CFP®: of current status. Where is the benchmark? Where are we starting from? So get organized around your life right now, personally and professionally. And yeah, financially, we're gonna be treating this like a business. So we'll ask you to gather that financial data as well again. We'll walk you through that process.

310

01:18:27.220 --> 01:18:47.599

Adam Cmejla, CFP®: and the the the the byproduct of that is that when you have the clarity and the direction, and the this the the stewardship, if you will of us walking you through this process, and you have things organized, which is, allows you to be focused. It makes figuring out what that next best step is

311

01:18:47.840 --> 01:19:14.479

Adam Cmejla, CFP®: a lot easier. And that's where we just roll up our sleeves, and we get to work. One of the biggest questions, the most common question, not the biggest but the most common questions that I would get from advisors is like, well, how did you know to begin, Adam? What like? What did you do first? And I started out with what was my? Why, what was my big? Why, when I joined this program in 2018, my wife was in a horrible job that she was miserable with, and I had to figure out a way to re, recreate about 140, grand in as quickly in as quick amount of time as possible.

312

01:19:14.760 --> 01:19:32.369

Adam Cmejla, CFP®: Oh, what's the easiest way to increase 140, or to create a hundred 40 grand. I could go out and find new clients, or I could raise fees and understand what my value was, and create a fee schedule that was commensured to that. So then I put the scripting together, and I did the inventory and analysis on my client base, and that led into my nit, and, like you, you have all the pieces to the puzzle.

313

01:19:32.860 --> 01:19:51.360

Adam Cmejla, CFP®: The vast majority of us as advisors just haven't had the opportunity to look at what is arguably the most important part of putting a puzzle together. And that's the box, right? We have to know what we're building, towards, which is your big why, before we can start figuring out how we put the pieces of this puzzle together.

314

01:19:51.360 --> 01:20:19.380

Adam Cmejla, CFP®: But again, I promise you that we had. This is not our first rodeo we've got this figured out. Don't become overwhelmed. Do spend the time to get organized, invest, and block out the time on the calendar. That's why we sent you the calendar. That's why. Translate that calendar, the shaded green boxes on the Mondays. Translate that to your outlook Calendar, your Gmail Calendar. Whatever you are doing right, use your calendar as your guide in next week's virtual lesson. I'll be spending an entire lesson on the importance of time at the importance. I think we all understand.

315

01:20:19.380 --> 01:20:40.869

Adam Cmejla, CFP®: understand the importance, time management, but some some of the best practices and tools and strategies that you can use to actually implement that so block the time off on the calendar to spend time working on this so that you can get organized, and then again block out the work. So with that, I guess that that's all I'd say. Just don't bend there done that. Got the T-shirt don't become overwhelmed. You're in a great place.



316

01:20:40.980 --> 01:21:09.329

Stephanie Bogan: Yeah. And I think that's it's a really good point. I was just making a couple of notes here. We'll talk about hot pads. I have a hot pad. So any ideas I get going my hot pad, anything that needs to be captured in our system goes on my hot pad. So by the end of the day the hot pad has to be trans. Either done or translated into my time management system to make sure everything gets captured and prioritized in the way that it needs to. And no Debbie, the 100 days off does not include weekends. That would be way too easy.

317

01:21:09.440 --> 01:21:31.980

Stephanie Bogan: Right? So it's weekends plus a hundred days off. We have advisors that are off 6 months of the year, and we have advisors that just take a few weeks because they've got young kids and they're in growth mode, right? It's about setting your goals there. It's really about setting your goals for the program. Adam really talked about a a lot of really good stuff there. But I wanna highlight one of the things he talked about, which is running the practice like a business

318

01:21:32.640 --> 01:21:54.530

Stephanie Bogan: which is actually one of the lessons we have in the library like, how can what do you need to change and shift to really kind of move into that mode? It's one of the things we'll be talking with you about inbox insights. As Alison mentioned, we'll come to you every other week. There will be important information about the program. More of that in the beginning. Obviously by this right into this month. You'll it'll all be kinda old hat

319

01:21:54.530 --> 01:22:02.899

Stephanie Bogan: but we drop coaching videos and resources with ideas on how to use them or apply them in there. So you definitely be looking at those.

320

01:22:02.900 --> 01:22:16.470

Stephanie Bogan: So I made a note to share some of the insights in one of our upcoming ones around running your practice like a business cause. It's one of the big themes. It's sort of a an invisible theme that really runs through everything that we do. And when you have even a lifestyle business.

321

01:22:16.730 --> 01:22:26.369

Stephanie Bogan: you have you really hit that formula of getting clear, getting focused and getting to work, and we tend to do the getting to work, and then put a lot of effort in

322

01:22:26.370 --> 01:22:51.360

Stephanie Bogan: and then think about getting focused and clear when things break down and they don't work in the ways that we want them. And it's funny I had one of my coaching calls with Michael kits this Monday we usually do right. Just ties and check ins, and you know, chic industry friend, check, chit, chat, kind of stuff in the beginning. And I don't remember how. But we actually got on the conversation of how much information is on kidscom, how much information I've written

323

01:22:51.360 --> 01:23:05.560

Stephanie Bogan: podcast had spoken, how there's like a wealth of everything you need to build, run, and grow a successful advisory firm out there. And yet most advisors struggle to do it like it's all out there.



324

01:23:05.590 --> 01:23:32.529

Stephanie Bogan: you know there's a gap. You've seen 7 conferences read 14 articles right? Some third party vendor has some amazing resource for you. if just knowing better or knowing there was a better way would ensure that you would do better. You'd all right, have your ideal practice. Now. It's about turning that knowledge into. Know. How? How do we apply what we learn? And you're gonna see this, get clear, get focused, get to work, model

325

01:23:32.530 --> 01:23:52.760

Stephanie Bogan: in every single thing that we do. Every lesson starts with clarity about what the outcome we want is what's breaking down, and why every single lesson right? How do we get focused? What are the things you need to know or work on? And how do you get to work? What's the action plan for implementing that lesson? What are the resources that are available. What's this? You know? What's the process that you need to follow?

326

01:23:53.220 --> 01:24:03.830

Stephanie Bogan: So you really have everything available to you. Michael talks about how the greatest investment that you can make. The greatest. Roi, that you have is investing in yourself. So I just want

327

01:24:04.070 --> 01:24:15.289

Stephanie Bogan: to congratulate all of you for taking that leap from knowledge to know how, as you've heard me say probably more than once, and you'll hear me say again when we have next week's summit.

328

01:24:15.380 --> 01:24:26.209

Stephanie Bogan: Change is hard because our brains are hardwired against it. The research actually says that the odds have changed or stacked against us 9 to one.

329

01:24:26.470 --> 01:24:46.320

Stephanie Bogan: And if you think about those mindset stats? I share how we're conditioned, hardwired creatures living off our habits, 90 to 95% of the time. That's about 9 to one that we're thinking consciously versus, not quite as consciously. And that's what we have to do in limitless is learn to sit in that 5%

330

01:24:46.990 --> 01:25:03.800

Stephanie Bogan: and expand it to 6%. 7%, 10%, you know, for Adam to look at his agenda for the next year to 3 years. Figure out where his business is, where he wants to be, what the gaps are, and how to get it done. Adam, is that hard in the oh, I know how to build the model and execute it at this point.

331

01:25:04.050 --> 01:25:05.560

Adam Cmejla, CFP®: Yeah, sometimes.

332

01:25:05.750 --> 01:25:20.379

Stephanie Bogan: Right. But the model is there. He's not like, Oh, God! What am I gonna do this year? How do I figure out what to do this year? It's hey. I've got a process for getting clear, getting focused and getting to work, whether it's right. One action item, whether it's a project he's working on.

333



01:25:20.470 --> 01:25:34.400

Stephanie Bogan: or his big plan for the year to his point. Does that mean that everything's easy and effortless, and it just flows like, you know, butter and honey, the land of honey. And of course not. We all me included, Adam included. Experience resistance.

334

01:25:34.730 --> 01:25:35.540

Stephanie Bogan: right?

335

01:25:35.960 --> 01:25:56.400

Stephanie Bogan: That really comes when things happen, the way that we don't want them to happen. And we want them to be different, right? And it's about how, as leaders and advisors, we address that resistance, and most of the time, about 90% of it, we accept it. We compromise, and we settle what we're really trying to teach you in limitless is how to shift

336

01:25:56.400 --> 01:26:20.159

Stephanie Bogan: from disempowered and reactive to, to, to very empowered and proactive. So that you're setting the course you're forging ahead, and you're learning how to stop and be aware when there are issues or challenges. And you're learning how to get clear about how to account for them and how to take action, so that the next time Julie 6, when Adam faces a problem, he doesn't go. Oh, my God, what do I do?

337

01:26:20.340 --> 01:26:50.139

Stephanie Bogan: He goes. Oh, this sucks. I got a problem. I've gotta fix it. And then he's got a mental process and a business process that he's developed over the last 5 or 6 years. That's now a habit routine for him where he used to get overwhelmed and frustrated and and hunker down. Now he can step into a different, better set of habits as an advisor and a business owner and a leader to navigate those challenges, and that resistance a lot more efficiently, a lot more effectively. And lo and behold, this is the amazing part

338

01:26:50.170 --> 01:27:01.760

Stephanie Bogan: a lot more enjoyably. It doesn't mean we don't have tough, hard days. It just means that they don't turn into months, weeks and years. Right? So we really can create a lot more successful, creating a lot more joy for ourself.

339

01:27:02.330 --> 01:27:17.440

Stephanie Bogan: All right. We are almost to the quiz, but not quite alright. Here are your next steps, and we are. Gonna have a good 20 min or so for questions. So be thinking about anything that you don't have answers to and make a note, so we can get to that in just a couple of minutes

340

01:27:17.500 --> 01:27:27.489

Stephanie Bogan: as soon as possible. We need you to complete your getting to know you and enrollment forms. That gives us the information that we need to support you and make sure that everything's set up in the system correctly.

341

01:27:27.520 --> 01:27:56.129

Stephanie Bogan: Commit to reading those inbox insights. We do not send them to you every week, so that you don't feel like we're just filling them with fluff. You'll get them every other week, I think, twice a



month first and third, or Alison could tell you. That's a detail that is below my pay grade. But I know they come out every other week. And there'll be insights and tips and things that you can implement in there. So be on the lookout for those. Add, if you have not already coaching@limitlessfa.life as a safe sender to make sure that you get all of our emails

342

01:27:56.470 --> 01:28:08.580

Stephanie Bogan: before our summit next week. Please join limitless tribe. What? The hurdle there? The hardest part on the website and the tribe. Like all new things. But certainly technology is starting

343

01:28:08.770 --> 01:28:29.240

Stephanie Bogan: like, if I walk into your office, Bridget. And I'm like, all right, we're gonna open the computer, click the button she'd be like. Well, that was no big deal. I did it in 3 min. If Bridget sits there and says I'm just using Bridget as an example. Cause I can see her. Sorry, Bridget. If Bridget's like, yeah, I'm gonna get to that later. What are the overwhelming odds that bridges not gonna get to it for the next 17 days, unless right, we email past her, the heck out of her

344

01:28:29.760 --> 01:28:46.450

Stephanie Bogan: right, that new. Our brain doesn't like new, especially when it comes to technology. So your second commitment for the day. Aside from putting time on your calendar, old school is to go into website or tribe ideally both. But tribe would be great to put your big. Y,

345

01:28:46.460 --> 01:28:53.940

Stephanie Bogan: that's your clarifying moment that says, Hey, limit this world group coaches tribe. This is why I'm here, and what I want to get out of it

346

01:28:54.390 --> 01:29:10.749

Stephanie Bogan: right? Claiming something is the first, most important step to actually receiving it. Right? So would love for you to do that. But make sure that you interact with the technology. Once you spend 3 to 5 min on there, you'll find it's really quite simple, but it will seem really overwhelming until you do it.

347

01:29:11.010 --> 01:29:27.140

Stephanie Bogan: set up your 2024 calendar with your baseline out of office, meeting times. Any other marketing growth conferences, etc. You can expand on that after the time lesson. But we want to just get you doing things right that are simple and doable as we kick off

348

01:29:27.270 --> 01:29:36.330

Stephanie Bogan: big ticket item complete. Your practice diagnostic. Allison will tell you there's an email, or it'll be an inbox. Where will that? Where will they get the

349

01:29:36.710 --> 01:29:40.119

Ramin Rouhbakhsh: aside from just going to the website. Where will their prompt be?

350

01:29:40.350 --> 01:29:52.489

Allison Foulk: So it yeah, it's on the website. Right now. But we can also include it in the next inbox. Yeah, we'll make sure to include a link in that for you. So you can get it. Members dot limitless. Fa, dot



life.

351

01:29:52.500 --> 01:30:01.559

Stephanie Bogan: Go to practice Diagnostic Section Register for the January sixteenth Virtual Summit. If you have not done that already, otherwise you will not be joining us.

352

01:30:01.560 --> 01:30:24.119

Stephanie Bogan: yeah, and complete your pre pre work and base camp lessons. If you have not done that yet. We will be reviewing parts of those in summit but a number of the sessions are designed are assuming right that you have actually gone through them. And we're gonna break it down and execute around those a little bit more so that's all in the emails. And on the website, if you need any assistance with that, don't hesitate to reach out to us

353

01:30:25.100 --> 01:30:27.180

Stephanie Bogan: alright. Was everyone paying attention?

354

01:30:28.460 --> 01:30:50.640

Stephanie Bogan: Yes, alright, there is a quiz are you ready? It is not a quiz on the information we just covered. You will probably forget 70 to 80% of what I shared with you. Anyway, that's just how our brains work until it's really relevant or important, your brain will forget it or set it aside, and how to log into the website or where to find things, doesn't really seem that relevant or important to your brain

355

01:30:50.640 --> 01:31:02.619

Stephanie Bogan: right now. But 2 days from now, when you're trying to get something done, it will. So just remember to go back to those emails or to the website and log in and look for that information first. And if you can't find it, reach out to us. Alright, are you ready.

356

01:31:03.610 --> 01:31:19.210

Stephanie Bogan: This is a thinking quiz. I know all the answers. You may not use the Internet. That's the only rule I'm going to give you 3 min to come up with as many correct answers as you can. Are you ready?

357

01:31:20.140 --> 01:31:23.169

Stephanie Bogan: Set? Hold on! Where's my timer?

358

01:31:25.210 --> 01:31:25.990

Stephanie Bogan: Go

359

01:31:29.340 --> 01:31:30.230

Barbara Norman, CFP: stupid!

360

01:31:59.080 --> 01:32:00.649

Ramin Rouhbakhsh: I've no idea what's going on.

361



01:32:00.660 --> 01:32:06.600

Ramin Rouhbakhsh: so we're taking a quiz and 3 min. You're supposed to write all that right? Answers. I don't know as many as you can. Yeah.

362

01:32:32.680 --> 01:32:35.130

Ramin Rouhbakhsh: is going on.

363

01:32:43.380 --> 01:32:55.969

Stephanie Bogan: I didn't say it would be an easy quiz. I didn't know. I don't know if people are supposed to be putting the answers in chat or just writing the answers.

364

01:32:57.200 --> 01:33:10.740

Adam Cmejla, CFP®: yeah, I'm sorry. You just need to write them for yourself. So can I give an example of what we're doing here.

365

01:33:11.810 --> 01:33:16.610

Natalie Bergsma: I like that, though, right? Immediate results. Like I don't know it. I have to share it. Let's get it out in the world

366

01:33:28.190 --> 01:33:30.149

Stephanie Bogan: right? We've got about a minute left.

367

01:33:35.590 --> 01:33:38.530

Stephanie Bogan: I love watching your faces while you do this. It's awesome.

368

01:33:51.080 --> 01:33:53.240

Stephanie Bogan: Jim Noac, you can figure this out.

369

01:33:53.890 --> 01:33:58.670

Adam Cmejla, CFP®: This is new. This is the first year I've done this. So there, if you're an alumni, there's not gonna help you.

370

01:33:58.900 --> 01:34:00.289

Stephanie Bogan: Sorry, Paul.

371

01:34:03.860 --> 01:34:07.279

Stephanie Bogan: Where's my timer? Alright, we've got 31 s.

372

01:34:16.320 --> 01:34:25.490

Adam Cmejla, CFP®: I was trying to respond to somebody in chat, but with as many answers that have gone, I'm not even gonna try scrolling up and going back to my draft. So

373

01:34:26.540 --> 01:34:30.400



Kevin Murray: I just wanna know how you got my Wi-fi password for Number 34.

374

01:34:33.080 --> 01:34:34.040

Adam Cmejla, CFP®: Nice.

375

01:34:35.490 --> 01:34:36.820

Stephanie Bogan: alright, you ready!

376

01:34:38.660 --> 01:34:45.299

Stephanie Bogan: How many? How many of you feel like you got them all? You can use your little let's practice our emojis. Where are the emojis?

377

01:34:47.310 --> 01:34:48.709

Stephanie Bogan: Down in your

378

01:34:50.280 --> 01:34:52.250

Stephanie Bogan: where do you do the little emojis at?

379

01:34:53.710 --> 01:34:57.529

Stephanie Bogan: In your reactions in the toolbar, you can just kinda go.

380

01:34:57.540 --> 01:34:58.600

Adam Cmejla, CFP®: Aye.

381

01:34:58.740 --> 01:35:04.299

Stephanie Bogan: yeah, I don't see reactions in mind. Oh, I have to. I have to scroll into it. Okay.

382

01:35:04.330 --> 01:35:08.530

Stephanie Bogan: alright. So how many of you got them all? Or you think you did?

383

01:35:11.440 --> 01:35:13.590

Stephanie Bogan: How many of you struggled with this?

384

01:35:17.560 --> 01:35:40.110

Stephanie Bogan: How many of you are not gonna answer, no matter what I ask. That is the anti limitless behavior that you want to break alright. So here you can see a lot of the answers in the quiz. It is a word. Riddle, quiz, right? So history repeats itself. Ring around the rosy read between the lines, you're under arrest. One in a million

385

01:35:40.220 --> 01:35:43.060

Stephanie Bogan: banana split. Big bird!

386



01:35:44.200 --> 01:35:55.190

Stephanie Bogan: How did you feel doing it? Oh, I unmute your mic. Someone like live human interaction. I like I wither without it. Leland, how did you feel as you were doing it?

387

01:35:55.430 --> 01:36:15.870

Leland Gross: Horribly confused at first. But then, when you get one right? So overwhelmed. And then you were like, Okay, I'd the light bulb goes off. Now I got it. You had a model, and it made it easier once you get it. Yeah, frustrated to satisfy right like. There's a little bit of messy middle. Erica. How about you.

388

01:36:16.490 --> 01:36:31.960

Erica Gnilka: Canil Canilka? You get that right? Or Nilka? Yeah, that's me. Same horribly confused. And then I started getting distracted by the chat. I probably should have hidden the chat. Anyone else. Gilly and Jim, don you anyone else feel frustrated?

389

01:36:32.140 --> 01:36:36.819

Stephanie Bogan: This is so stupid. This is not what I'm paying for. Why am I doing this?

390

01:36:37.200 --> 01:36:53.370

Stephanie Bogan: Anyone's brain pop in and go. I feel dumb. I don't want anyone to know that I don't know the answers to these. That's my first response to everything like this, because I feel like it just makes me feel dumb. You wanna win.

391

01:36:53.730 --> 01:36:59.849

Stephanie Bogan: So here's an interesting observation. I said that I knew all of the answers.

392

01:36:59.910 --> 01:37:04.639

Stephanie Bogan: and that you had 3 min to to finish. Not one single person asked for help.

393

01:37:06.660 --> 01:37:10.690

Stephanie Bogan: Not one of you said, Hey, Steph, I need help with Number 10

394

01:37:11.040 --> 01:37:16.869

Stephanie Bogan: cause I literally write, wrote. I know all the answers you may not use the Internet. That is the only rule.

395

01:37:17.370 --> 01:37:19.070

Stephanie Bogan: Where did your brains go?

396

01:37:20.390 --> 01:37:22.279

Stephanie Bogan: Number one thing we do.

397

01:37:22.580 --> 01:37:26.139

Stephanie Bogan: I got this. I got this. I'll figure it out.



398

01:37:27.480 --> 01:37:33.089

Stephanie Bogan: and we when we can't figure it out, we get frustrated. And if we're not in a group like this, we just sit it aside right.

399

01:37:34.270 --> 01:37:47.950

Stephanie Bogan: That is the feeling that you're going to have many times this year. I want to start with it because I want you to get used to it because I don't want you to be afraid of it. I want you to embrace it. What's what was on the other side of that frustration for Leyland

400

01:37:48.790 --> 01:37:51.459

Stephanie Bogan: for Jim. Did you hear the words that they used?

401

01:37:51.800 --> 01:37:54.820

Stephanie Bogan: Yes, faction like, yeah.

402

01:37:55.060 --> 01:38:10.300

Stephanie Bogan: I got it. I figured it out. I'm capable. I'm a winner. Oh, my gosh, what an amazing analogy for limitless we are. Gonna challenge your thinking, your habit, realms, thought, personal practices and business practices, those habit realms.

403

01:38:10.320 --> 01:38:25.400

Stephanie Bogan: We're going to challenge them constantly. and as soon to Adam's point like it took him. I don't remember. Adam was like 8 or 9 months to really find your growth like, really find your groove right? Because he was working through a lot. And then it kind of all made sense.

404

01:38:25.810 --> 01:38:35.769

Stephanie Bogan: Got the model for success. And he went. Oh, yeah, I guess if I want to make more money, the number one thing I can do is stop under charging for my services. I think I'll start there.

405

01:38:35.830 --> 01:38:56.050

Stephanie Bogan: Oh, now I gotta ask myself, why am I gonna keep doing this? Okay, what do I tell the new clients? Well, how do I make sure that my fees are worth it. What kind of service model can I communicate? What do I put on my website like just down the rabbit hole, he goes. He did not have a grand 3 Year plan with it all mapped out. You don't need that to succeed in limitless. You need to go to each summit.

406

01:38:56.610 --> 01:39:11.270

Stephanie Bogan: Look at your practice diagnostic. Look at your summit action, plan, and say to yourself, Jim, Erica Leland, Florentino, what's my big this quarter. What is the thing that if I get it done, that outcome is gonna be awesome and is gonna move the needle.

407

01:39:11.300 --> 01:39:23.539

Stephanie Bogan: and then I can build on that success, and the fly will starts to move. So this is a fun exercise one cause. It's just hilarious to watch people do it. I did it once, and I was wildly uncomfortable, so don't feel bad. I've been through it



408

01:39:23.720 --> 01:39:33.829

Stephanie Bogan: once you figure out the model of success. Oh, it's a thinking exercise notice. I didn't tell you in the beginning it was the thinking exercise. But if you stopped and focused

409

01:39:34.300 --> 01:39:37.259

Stephanie Bogan: for just a second or 2, did you figure it out?

410

01:39:38.690 --> 01:39:39.670

Stephanie Bogan: Yes.

411

01:39:39.870 --> 01:40:00.500

Stephanie Bogan: that's going to the website for a couple of minutes to get started. That's sitting down and building an action plan for your next project. That's hey? I have to have that conversation with a client. Let me bullet point out the talking point so I can feel really comfortable and confident, communicating what I need to communicate. It's learning to pause the reaction.

412

01:40:00.930 --> 01:40:17.489

Stephanie Bogan: Take some time to figure out what needs to be done, and then figure out what our model, our blueprint for success is, and use that to make it easier, better, and more enjoyable. Now, if you guys got to break into groups and work on this together. Do you think you would get all the answers correct? Faster or slower

413

01:40:18.140 --> 01:40:33.069

Stephanie Bogan: way faster, right? Those of you who looked in chat we're like, Oh! And as soon as you saw one you were like, Oh, now I totally get it. And you you got some really easy and some you got really stuck on right. And then someone else had pop that in the chat like it was no big deal.

414

01:40:33.080 --> 01:40:35.819

Stephanie Bogan: That's what coaching and community is for

415

01:40:36.080 --> 01:40:44.979

Stephanie Bogan: the research says that the thing that breaks that change stat of 9 to one against you. There are 2 things that radically improve the odds of change.

416

01:40:45.010 --> 01:40:47.350

Stephanie Bogan: coaching. and community.

417

01:40:47.750 --> 01:40:51.739

Stephanie Bogan: We have both of those in abundance here. There's no shortage.

418

01:40:51.780 --> 01:41:03.290

Stephanie Bogan: so if we can shift the way that we think, if we can follow a bottle or a blueprint for success, and we can connect and rely on each other our odds of success better



419

01:41:03.580 --> 01:41:05.190

Stephanie Bogan: or less better.

420

01:41:09.200 --> 01:41:16.170

Stephanie Bogan: I'm just gonna wait for someone to answer better. This is again, the interactive part. I know video is fun for that.

421

01:41:16.280 --> 01:41:23.699

Stephanie Bogan: That's the whole point of this exercise is to help you recognize that you have everything that you need here to succeed.

422

01:41:23.960 --> 01:41:52.779

Stephanie Bogan: Many a person advisor has been here before you and use these resources, coaching, content and community with success. It's really about how you apply it, right? Which means you've got to be clear on what you want to do. That's the big. Why work you're doing, you have to have the right mindset which we're starting on, and we'll work on all year, and you have to take agency over your time, or the best of intentions will not result in very much. So I want you to think about all the things we're gonna cover and learn this year

423

01:41:53.720 --> 01:41:59.540

Stephanie Bogan: if you did everything. Just as I said, I said, Jim, I'm coming to your office.

424

01:41:59.700 --> 01:42:14.339

Stephanie Bogan: We're gonna at at the end of each summit. We're gonna pick your priority, your big and then your your secondaries. And we're gonna talk about how you apply that and kind of the guide, the guard rails and the rules. You gotta follow right? You're gonna charge this much. You're gonna use your time this way, whatever it is.

425

01:42:14.360 --> 01:42:29.419

Stephanie Bogan: And, Jim, I'm gonna leave a suitcase with 2 or \$300,000. Whatever your big Y money is, money is usually on that list. I'm gonna leave it in your conference room for you to see, or maybe the kitchen, so it doesn't freak the clients out that you're laundering money. I'm gonna leave this suitcase full of cash

426

01:42:29.450 --> 01:42:40.450

Stephanie Bogan: sensors. So no one takes it in your kitchen for the year. And at the end of the year, if you implement this lesson, the way that we talked about. You're gonna get this suitcase full of money, would you do it, Jim?

427

01:42:41.940 --> 01:43:05.760

Stephanie Bogan: Heck? Yeah, right. You would all do it. Now the kicker is, I'm gonna go to Jim, and I'm gonna say, but, by the way, every time you make a compromise if you set the minimum at 5 and you take the client. It's 4, because, you know, in 10 years they're gonna be there. It's okay. But every time you compromise on our committed agreements I'm gonna come to the office. And I'm just gonna take \$25,000 out of the suitcase. Is that okay?



428

01:43:06.960 --> 01:43:12.899

Jim Nowak, CFP®, AIF®, AAMS®: Yeah, that's painful. Jim's gonna say, yeah, that's painful. And then is Jim still gonna do that at least once.

429

01:43:13.920 --> 01:43:20.069

Stephanie Bogan: probably. And then I'm gonna come and I'm gonna take the \$25,000 out of the suitcase, and it is Jim. Gonna do that again.

430

01:43:21.900 --> 01:43:31.129

Stephanie Bogan: according to the research. Oftentimes. Yes, he'll do it twice. cause the first time it hurts the second time we're like, Oh, there's a pattern damn. I really have to stop.

431

01:43:31.950 --> 01:43:48.820

Stephanie Bogan: It's interesting. We will literally, according to the research, do something bad for us, not once, usually, but twice, because twice we're like, Oh, yeah, it wasn't a fluke. It really shouldn't do that. The money is actually leaving regularly. I don't. I can see the pattern of that 200,000 turning into 0 very quickly.

432

01:43:49.630 --> 01:43:57.289

Jim Nowak, CFP®, AIF®, AAMS®: Is this a real game that we're playing? By the way? Well, it is, except the the money is already on your conference room table.

433

01:43:58.100 --> 01:44:02.229

Stephanie Bogan: It's there. If you execute the lessons

434

01:44:03.090 --> 01:44:22.180

Stephanie Bogan: tailored to your practice. Right? Don't I mean by tailored, I mean, don't. Don't do things that are completely counter to what is in the lesson, and call it tailoring. But in general, if you apply the principles and the practices that we teach you, and the processes and the tools, because we give you those scripts samples, all of it. You're almost never starting from scratch

435

01:44:22.790 --> 01:44:26.550

Stephanie Bogan: and you follow it. Do you know what the inevitable result is?

436

01:44:28.380 --> 01:44:30.170

Stephanie Bogan: More time, income, and freedom?

437

01:44:30.660 --> 01:44:38.759

Stephanie Bogan: It's inevitable because consistency compounds. If you make decisions that align with your goals over and over and over again what has to happen?

438

01:44:40.390 --> 01:44:59.329

Stephanie Bogan: The goals get realized to Adam's Point. It doesn't mean that you don't have



challenges, Ian, that something doesn't come in your way, or that a client that you love and your harder service wants to help. But they're short, and your brain is saying, Don't do it, don't do it. It's a compromise, and the other part of your brain is like, but they're so nice, and they'll be there soonish

439

01:45:00.460 --> 01:45:05.679

Stephanie Bogan: right? If the suitcase full of money was there. what would you do?

440

01:45:06.230 --> 01:45:18.559

Stephanie Bogan: Would you make that compromise if you had to pull the money out of the suitcase after telling that potential client. Yes, and it was really there, you wouldn't do it, or the odds would be 9 to one that you wouldn't do it in your favor.

441

01:45:18.940 --> 01:45:23.479

Stephanie Bogan: So I want you to remember the suitcase full of money. I always joke that you should take a screenshot

442

01:45:23.700 --> 01:45:35.180

Stephanie Bogan: literally and put it up in your kitchen, your office, your bathroom, wherever, and remind yourself that you are a powerful creator. You are here to create more income, time and freedom for yourself.

443

01:45:35.220 --> 01:45:46.809

Stephanie Bogan: and you have everything that you need to do that you just have to remember that the money isn't yet physical in your office, but it is on its way to you as long as you align your thinking

444

01:45:46.820 --> 01:45:59.180

Stephanie Bogan: and your habits, and use the resources that we give you. So with that I will wrap us up. That is the end of our kickoff call. and we have some time for questions. What questions do you have?

445

01:46:02.640 --> 01:46:16.410

Stephanie Bogan: I love Christy's post Christy's been around for a number of years. I have a picture of our 4 kids on my desk, and every time I talk to a prospect that's not ideal. I remember if I take that on, I'm saying yes to them and no to more time with my kids. Ouch.

446

01:46:16.710 --> 01:46:26.549

Stephanie Bogan: Christy. I knew I really liked her because we both count Summers. I did this thing. I don't remember how many summers I had, but one day I was like, Oh, my gosh! I only have 8 summers left with my kids, only 8 Christmases.

447

01:46:27.130 --> 01:46:42.599

Stephanie Bogan: And I was like then it's only 5 then it's only I was like, Oh, my gosh, this is like, I've gotta re really reminds me to align my time to the best of my ability, because, you know, the time with those people that I mean. I'll have them hopefully my whole life. But it will be a little bit different.

448

01:46:43.060 --> 01:47:01.640



Stephanie Bogan: Right? So what is your version of that right? What's gonna be your reminder, your motivator, a picture of your family, a picture of you doing hobbies. We'll talk more about this at the summit. If you have to print out a picture of a suitcase full of money to remind you that the only way to get that suitcase full of money, and it's filled with time and freedom as well

449

01:47:01.650 --> 01:47:03.810

Stephanie Bogan: is. Do align the tongue in your mouth.

450

01:47:04.370 --> 01:47:10.780

Stephanie Bogan: What we say we want with the tongue in your shoes, which is the actions that we actually take.

451

01:47:10.890 --> 01:47:21.650

Stephanie Bogan: So with that? Any other questions. Ken has a question here. I filled out the getting to know you form, and don't see the answers and try. Will you put them all there? Allison?

452

01:47:21.750 --> 01:47:31.199

Allison Foulk: The getting to know you form answers. I believe their email to you. We can look into that. I know there's a process for getting them to. I think it comes via, email.

453

01:47:31.540 --> 01:47:33.300

Stephanie Bogan: Yeah, if you need that. Let us know

454

01:47:33.370 --> 01:47:45.430

Stephanie Bogan: that are in my cohort. Just reminder. We've got a follow up conversation here in about 1 min or so. Different Zoom link for that one. But I'll see everybody that's in the code that's in my cohort here. Right after this meeting.

455

01:47:45.530 --> 01:47:52.059

Stephanie Bogan: Excellent any questions about calls, events where to find things how to ask for help.

456

01:47:52.950 --> 01:47:55.519

Andrew Kessler: I was looking for Zoom Link for the cohort.

457

01:47:56.550 --> 01:48:03.000

Adam Cmejla, CFP®: We'll we'll drop it in the chat for you, Andrew Adam. Do you have that to grab and put it there.

458

01:48:03.320 --> 01:48:06.500

Adam Cmejla, CFP®: just that'll that'll go to everybody.

459

01:48:06.520 --> 01:48:19.629

Allison Foulk: Okay, I do. I do wanna note that we have a member who has signed up for the program this year, and it's on this call. During this call



460

01:48:19.670 --> 01:48:32.709

Allison Foulk: Brian Swilling. So I figure I need to give him a shout out because he signed up this morning and made it here. That is pretty impressive. That is the kind of motivation that will make the magic happen, Brian welcome.

461

01:48:32.710 --> 01:49:02.200

Stephanie Bogan: He figured it out without even messaging us to ask for help. So alright. We expect good things, Brian. You've set the bar now. Everyone's like. Now I have to go read the emails. Alright, we wanna value your time and give you the rest of it back. If you are in Adam's cohort. You have the cohort kick off. Call immediately after this one. If you are a leaders member then we'll have our leaders kick off later today, based on the invites. If you have any questions about the program, how to use it, how to engage, how to get help

462

01:49:02.200 --> 01:49:19.560

Stephanie Bogan: email coaching at limitless fault life and I and our very awesome team will be here to give you a power assist as needed. With that welcome, everyone, and we will kick off program and learning next Tuesday, the sixteenth, at our performance summit. I look forward to seeing you, then make it a great day.

