



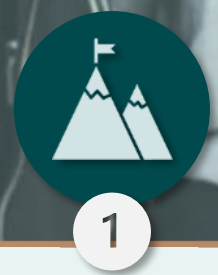
LIMITLESS LEADERS

2024 PROGRAM KICKOFF

January 8, 2024

WHAT'S
YOUR
BIG
WHY?

BUILD A WILDLY SUCCESSFUL BUSINESS AND A LIFE THAT YOU LOVE



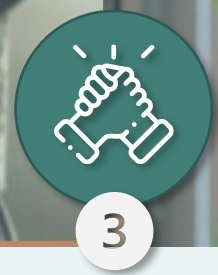
1

WORK WITH
PURPOSE, ON
YOUR TERMS



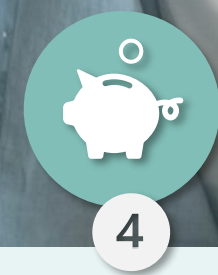
2

DO WORK
THAT YOU
LOVE



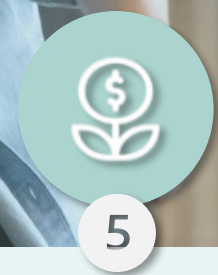
3

WORK WITH
PEOPLE YOU
ENJOY



4

ENJOY
FINANCIAL
SUCCESS



5

LIVE A LIFE OF
HAPPINESS &
CONTRIBUTION

PAY ATTENTION

- AT THE END OF THIS CALL THERE WILL BE A BRIEF 3-MINUTE QUIZ
- NO PHONES, NO EMAIL, NO DISTRACTIONS
- ATTENTION IS A MUSCLE, PRACTICE BUILDING IT!



1 history history history	2 R g rose e i n	3 MEREPEAT	4 _____ read _____
5 Arrest You're	6 M Meal M e e a a l Meal l	7 E more more more more	8 wonalicederland
9 me right	10 stefrankin	11 Chimadena	12 settle
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33 VA DERS	34 9S2A5F4E1T8Y6	35 _____ it	36 chawhowhorge
37 RIGHT RIGHT	38 TULIPS	39 \$0 all all all all	40 knee light light

LIMITLESS LEARNING TEAM

TEAMWORK MAKES THE DREAM WORK

STEPHANIE BOGAN
Limitless Advisor



Chief Possibility Officer

ADAM CMEJLA
Integrated Planning & Wealth



Advisor Coach

NATALIE BERGSMA
BeyondFA



Practice Coach

LIZ HAND
Pleasant Wealth



Mindset Coach



MICHAEL KITCES
Kitces.com



BOB NACHMAN
Absolute Engagement



MEGAN CARPENTER
FiComm Marketing



ALLISON FOULK
Program Manager



LEONA ABRAHAO
Program Coordinator



KATHRYN WALLER
Program Specialist



DANIELL WELLS
Program Specialist



MINDSET

THE SECRET TO SUCCESS LIES
IN THE SCIENCE OF BEHAVIOR



MAPPING

WHEN YOUR VISION IS CLEAR,
YOUR DECISIONS ARE EASY



METHODS

ALL THE BEST PRACTICES,
READY TO WORK IN YOURS



MOMENTUM

MAKE RESULTS,
NOT EXCUSES

LIMITLESS COACHING MODEL

A TESTED TRACK TO RUN ON

Limitless Coaching provides you a tested track to run on. No trial runs here.

TRUSTED COACHES TO ELEVATE YOUR GAME

You show up with the commitment, and we'll guide you through the changes.

PROVEN PRACTICES AND A PATH TO FOLLOW

Without a new path and better practice, you're likely to keep getting the same results.

THE TOOLS AND TRAINING YOU NEED

Our coaching, courses, & content put strategies & solutions you need at your fingertips.

ACCOUNTABILITY THAT CREATES ACTION

We'll help you think bigger, take more and better actions knowing we have your back.

A TRIBE TO TAKE YOU TO NEW HEIGHTS

Limitless is a tribe of growth-minded advisors committed to their success and supporting yours.



Lifestyle
Practice

Founder
dependent

"succeed & serve"

Successful
Firm

Founder-Partner
Driven

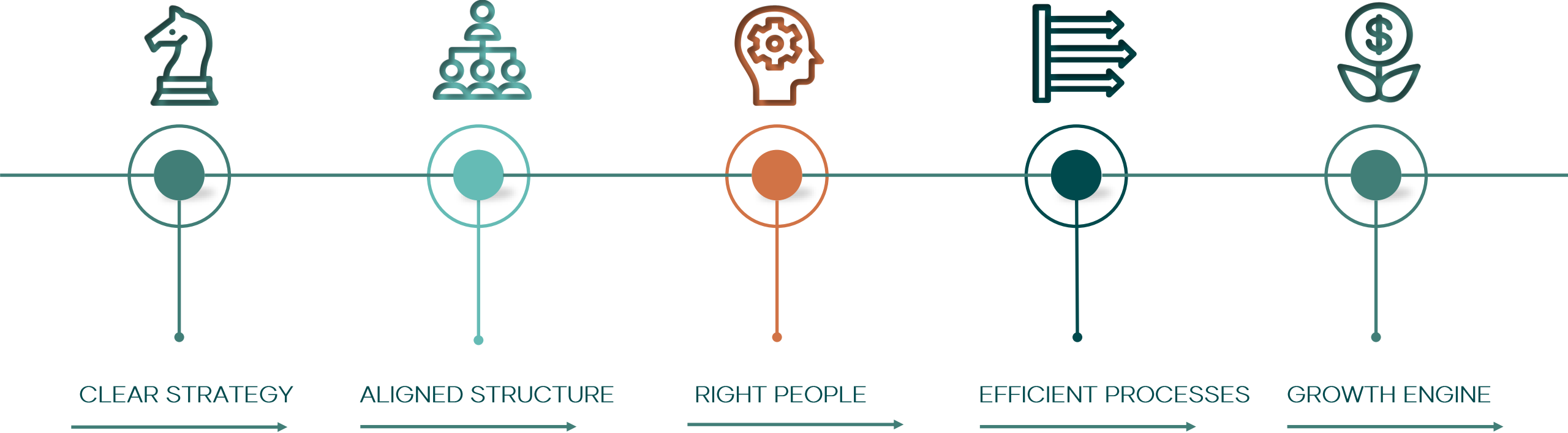
"scaling growth"

Autonomous
Business

Independent,
Transferable
Operations
& Value

WHICH DO YOU HAVE?
WHAT DO YOU WANT TO BUILD?

A WORKING MODEL FOR SUCCESS



LIMITLESS

THE PATH TO A \$1M/100 DAYS OFF/YEAR PRACTICE
YOU DON'T HAVE TO DO IT ALONE

BASE CAMP
LEARNING PATH

LIMITLESS
LEARNING PATHS



SUCCESS SHIFT #1

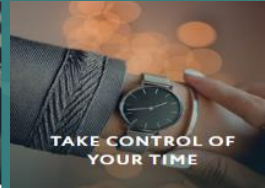
ELEVATE YOUR THINKING



MY MODEL PRACTICE

SUCCESS SHIFT #2

DESIGN YOUR MODEL PRACTICE



TAKE CONTROL OF YOUR TIME

SUCCESS SHIFT #3

TAKE CHARGE OF YOUR TIME



SUCCESS SHIFT #4

BE A TRUSTED ADVISOR



ONE-PAGE FINANCIAL PLAN

SUCCESS SHIFT #5

PACKAGE YOUR VALUE



TELLING YOUR STORY

SUCCESS SHIFT #6

COMMUNICATE YOUR VALUE



SUCCESS SHIFT #7

STAFFING FOR SUCCESS



5-STAR SERVICE MODEL

SUCCESS SHIFT #8

SYSTEMIZE YOUR SPECIAL



CLIENT MEETING SURGES

SUCCESS SHIFT #9

GEAR INTO GROWTH

COACHING ROADMAP



- Science of Success
- Your Vision For Success
- Taking Control of Your Action & Accountability
- High-Performance Happiness
- Strategic Planning
- Managing Firm Performance
- Managing People, Project & Priorities

PERFORMANCE
PLAYBOOK
• RETREAT •

PERFORMANCE
SUMMIT

- Nailing Your Niche
- Telling Your Story
- No Stress Prospect Process
- Finding Your Fees
- 5-Star Service Model
- Client Meeting Surges
- Right-Sixing Your Client Base
- Amazing First Meeting/One-Page Plan

DEEPER VALUE
DELIVERY
• RETREAT •

VALUE
SUMMIT

- Optimizing Operations
- Tech Stack Strategy
- CRM Workflows
- Rock Star Right Hand
- Building & Managing Teams
- Tech Vendor Special Guests

PRODUCTIVITY
POWER-UP
• RETREAT •

PRODUCTIVITY
SUMMIT

- Building a Breakout Brand
- Making Your Marketing Action Plan
- Websites That Work
- Cultivating COIs
- Choosing Your Channel
- Marketing Implementation

GROWTH
BEAR-UP
• RETREAT •

GROWTH
SUMMIT



PROGRAM GUIDEBOOK



Check Inbox Insights for your Program Guide



YOUR GUIDE MAP

TRAILHEAD LESSONS Critical | Important | Low **ADVANCED CLIMB LESSONS** Critical | Important | Low

PERFORMANCE PLAYBOOK VIRTUAL SUMMIT

The Science of Success	<input type="checkbox"/>	High-Performance Happiness	<input type="checkbox"/>
Your Vision for Success	<input type="checkbox"/>	Strategic Planning	<input type="checkbox"/>
Taking Control of Your Time	<input type="checkbox"/>	Managing Firm Performance	<input type="checkbox"/>
My Model Practice	<input type="checkbox"/>	Managing People, Project, & Priorities	<input type="checkbox"/>
Action and Accountability	<input type="checkbox"/>		

DELIVERING DEEPER VALUE VIRTUAL SUMMIT

Nailing Your Niche	<input type="checkbox"/>	Right-Sizing Your Client Base	<input type="checkbox"/>
Telling Your Story	<input type="checkbox"/>		
Finding Your Fees	<input type="checkbox"/>		
No Stress Prospect Process	<input type="checkbox"/>		
5-Star Service Model	<input type="checkbox"/>		
Client: Making Surges	<input type="checkbox"/>		
Amazing First Meeting / One Page Plan	<input type="checkbox"/>		

PERFORMANCE PLAYBOOK RETREAT

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

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

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

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

ESSENTIAL TRAINING
Complete Mindset Base Camp

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

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

ADVANCED CLIMBS

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

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

ACTIVITY POWER-UP VIRTUAL SUMMIT

Personalized Pitch Deck	<input type="checkbox"/>	Tech Stack Strategy	<input type="checkbox"/>
		CRM Workflow	<input type="checkbox"/>
		Building and Managing Teams	<input type="checkbox"/>

GEAR-UP VIRTUAL SUMMIT

Brand Channel	<input type="checkbox"/>	Marketing Implementation	<input type="checkbox"/>
Content	<input type="checkbox"/>	Content Marketing	<input type="checkbox"/>
Marketing Action Plan	<input type="checkbox"/>	Referral Roadmap	<input type="checkbox"/>

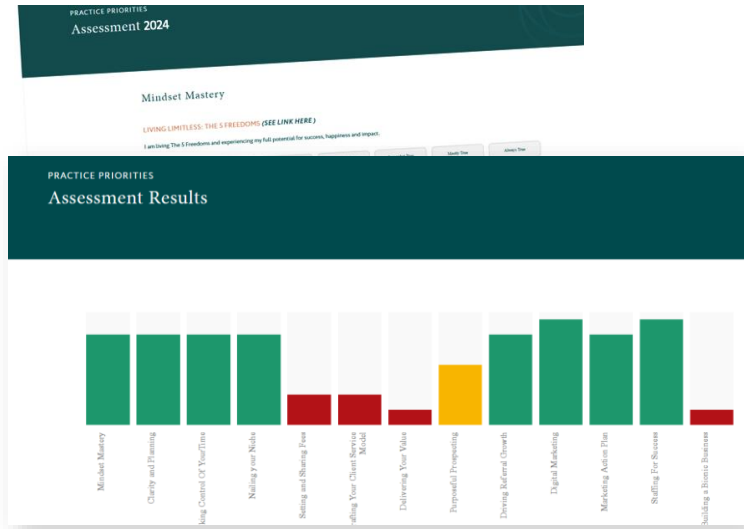
LIMITLESS



1

PRACTICE DIAGNOSTIC

Your personal Practice GPS helps you to prioritize and focus your time & attention.



2

PROGRAM GUIDEBOOK w/COACHING ROADMAP

Provides a proven path to set and achieve your practice goals.



3

SUMMIT TRAIL GUIDES

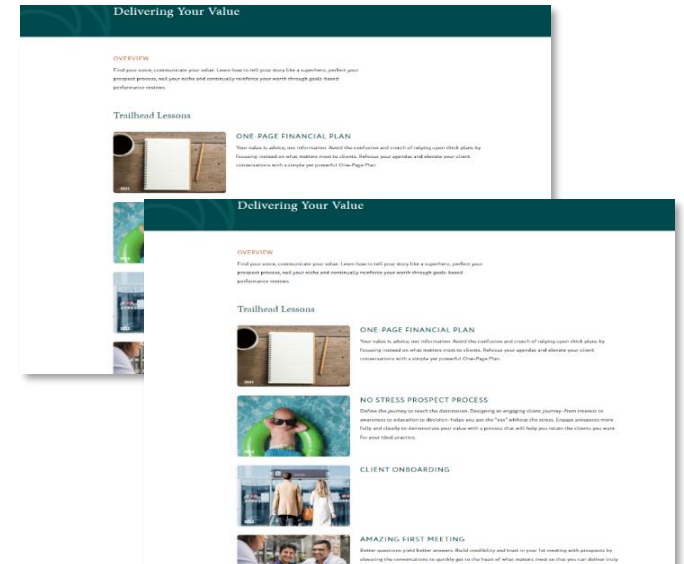
Each Summit is a guided tour of that quarter's Limitless Learning Path.



4




WEBSITE & TRIBE FORUM

Access to all the coaching, content, and community you need to create new levels of success.



2024 PROGRAM

COACHING SUPPORT

-  Peak Practice Coaching Calls
-  Personal Peak Coaching Calls
-  Leaders Cohort/Office Hours



LEARNING SUMMITS





WHO ATTENDS WHAT CALLS

**Leaders & Leaders
Co-Members:**
Leaders Peak
Practice Calls
(practice-focused)






Personal Peak
Coaching Calls
(mindset/exec coaching)

Leaders Cohort/
Office Hours
(Accountability / Q&A)

**Leaders
Team Members:**
All Lifestyle Calls

LIMITLESS Leaders 2024

COACHING CALLS & EVENTS CALENDAR

	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC
Limitless Calls												
LEADERS PEAK PRACTICE CALL 11:00 AM-12:30 PM PT (Leaders & Co-Members Only)	N/A New Year's Day	2/5	3/4	4/1	5/6	6/3 Productivity Summit	7/1	8/5	N/A Labor Day	10/7	11/4	12/2
PEAK PRACTICE OFFICE HOURS 9:00-10:00 AM PT (Lifestyle & Leaders)	1/8 Kick-Off Calls (Call Times TBA)	2/12	3/11 Value Summit	4/8	5/13	6/10	7/8	8/12	9/9	10/15 Tuesday after Columbus Day	11/12 Tuesday after Veterans Day	12/9 Program Wrap-Up
PERSONAL PEAK COACHING CALL 9:00-10:30 AM PT (Lifestyle & Leaders)	N/A Martin Luther King Jr. Day	2/20 Tuesday after President's Day	3/18	4/15	5/20	6/17	7/15	8/19	9/16	10/21	11/18	
LEADERS COHORT/ OFFICE HOURS 11:00 AM-12:30 PM PT (Leaders & Co-Members Only)	1/22	2/26	3/25	4/22	5/28 Tuesday after Memorial Day	6/24	7/22	8/26	9/23	10/28	11/25	
Limitless Events												
VIRTUAL SUMMITS	1/16 Performance Summit		3/11 Value Summit			6/3 Productivity Summit			9/3 Growth Summit			
RETREAT WORKSHOPS			3/20 - 3/21 Value Retreat Workshop						9/11 - 9/12 Growth Retreat Workshop			
LEADERS RETREATS			3/21 - 3/22 Spring Leaders Retreat		5/22 - 5/24 Leaders Everest Event				9/12 - 9/13 Fall Leaders Retreat			

*There are no calls on 5th Mondays

YOUR COACHING CENTER

Peak Practice

Group Coaching Call

Join us for our Peak Practice Call the first week of each month, focused on Limitless principles and best practices. These 90-minute calls deliver valuable insights, practical content, in-practice examples, and a generous allowance of time for your questions and coaching.

Peak Practice

Office Hours

Discuss expanded topics and get your specific questions answered live during this 60-minute call with our practice coaches and your Limitless peers.

Personal Peak

Group Coaching Call

Our mindset coaches provide focused insights on how to successfully apply Limitless learning, discuss expanded topics, dive into mindset road-blocks, and show up ready to answer your implementation questions.

Leaders Cohort

Office Hours Group

Our 90-minute monthly Leaders think tank call offers practical insights and peer support applying what you learn. Work through specific questions, share real-time implementation of Limitless principles, and hold one another accountable to keep moving forward.

WEEK 1

WEEK 2

WEEK 3

WEEK 4

PERSONAL COACHING

Consulting Calls w/Stephanie (3/yr)

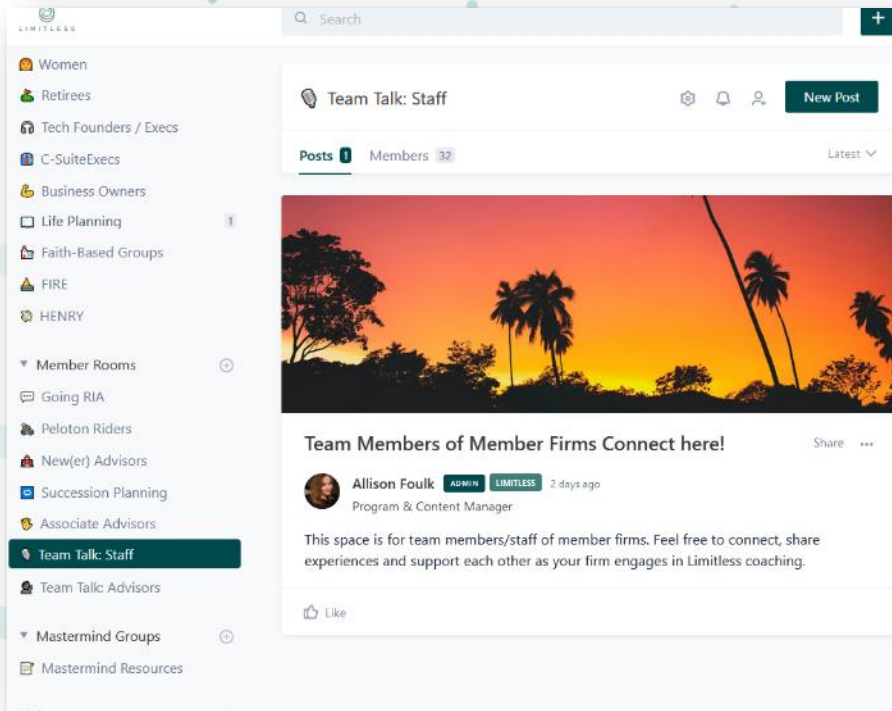
- Jan: Get clarity and design your strategy for the year.
- Jun: Mid-year check-in to maintain focus while getting personalized consulting advice to support your progress.
- Oct: 2025 business plans and priorities; consulting guidance

Personal Coaching Pass Calls (6/yr)

Schedule up to six (6) one-on-one coaching sessions with an Advisor Coach, Practice Coach, or Executive Coach to get personalized advice and guidance when and where you need it.

For Team Members

Team Member Call Cheat sheet



Use **Teams ONLY Discussion Space**, where key team members can talk shop, share resources and get pointers from Limitless Team alumni who have walked your trail before.

A graphic titled 'Team Member Call Cheat Sheet FOR DESIGNATED TEAM MEMBERS ONLY'. It contains the following information:

Welcome to Limitless! You're invited to attend our bi-monthly coaching calls, on both practice and personal development, as well as our weekly office hours. Attend as many calls as you and your advisor feel are helpful. On our website, you'll find lesson videos, resources, and reading that will support your efforts this year. Also, be sure to log in to the Good Vibes Tribe and join the Team room so that you can connect with other stellar teams as they share both best practices and in-practice tips.

CALL LINKS:
LIFESTYLE PROGRAM KICK-OFF CALL
January 9, 2023 (9-9:45 PST)
Join via this Limitless Call Line: [ZOOM link](#)

COACHING CALLS
1st and 3rd Mon. of month (9-10:30 PST)
Week 1: Practice Development; Week 3: Personal Development
Join via this Limitless Call Line: [ZOOM link](#)

OFFICE HOURS
Every Mon. of month (1:00 - 2:00 PST)
Week 1 & 3: Personal Development; Week 2 & 4: Practice Development
Join via this Limitless Call Line: [Zoom link](#)

WEBSITE & TRIBE LINKS:
LEARNING CENTER: [Member Website](#)
COACHING CENTER: [Good Vibes Tribe](#)

Our Service Standards:
Email coaching@limitlessforlife.com and we will respond to your email within 24 hours on business days. If urgent, call [784-779-8884](tel:784-779-8884).

LIMITLESS
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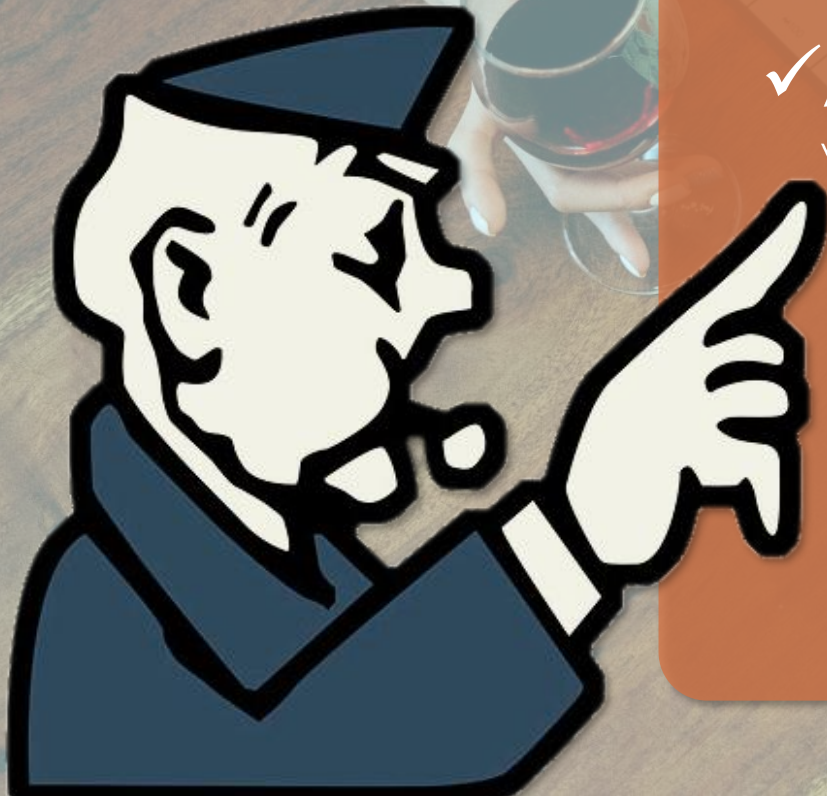
- Join calls to LISTEN IN AND LEARN.
- USE THESE LINKS to join calls (NOT the member invite link to join calls).
- We monitor ADVISOR ATTENDANCE, and this keeps the data clean. (Thank you!)



STOP! DO NOT PASS GO...

UNTIL YOU HAVE:

- ✓ Completed your Enrollment Form & Your Getting to Know You Form
- ✓ Added coaching@limitlessfa.life to your safe sender list in your email
- ✓ Committed to reading our biweekly Inbox Insights
- ✓ Started on your Base Camp Learning Path lessons and action items



WHERE
TO
GO
FOR ...



SERVICE
QUESTIONS

COACHING@LIMITLESSFA.LIFE



COACHING

PEAK PRACTICE CALLS

PERSONAL PEAK CALLS

MONTHLY OFFICE HOURS

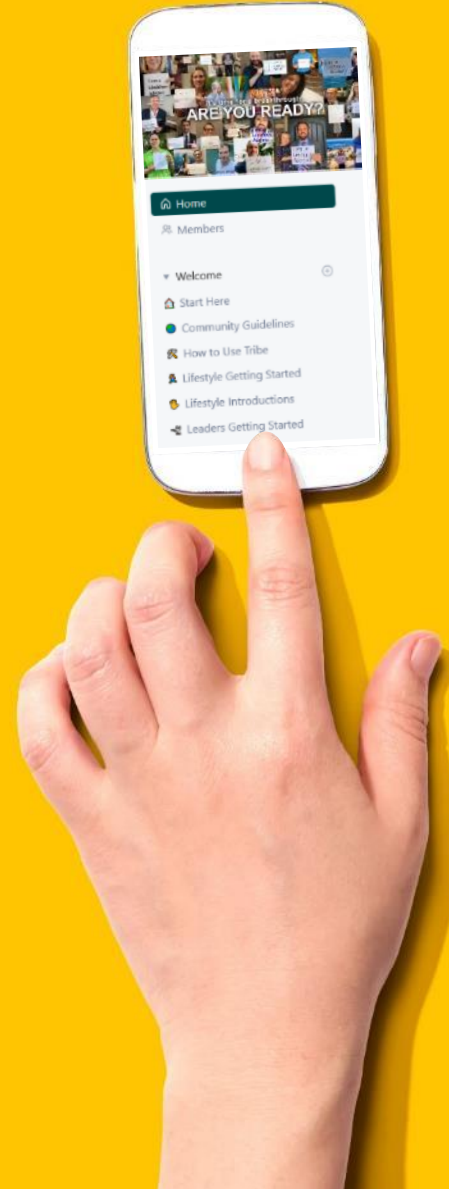
TRIBE COMMUNITY



LESSONS &
RESOURCES

members.LimitlessFa.life

GOOD VIBES TRIBE



Get ready to
get Limitless.

THE LIMITLESS MEMBER SITE COACHING CENTER

TESTLEADERS2022 TEST

ACCOUNT

CALENDAR

COACHING CENTER ▾

COACHING CALLS

OFFICE HOURS

MASTERMINDS

SUPPORT

LEARNING CENTER ▾

GOOD VIBES TRIBE

LOGOUT

PROGRAM OUTLINE

CLARITY & ACCOUNTABILITY

- Action and Accountability
- Take Control of Your Time
- The Science of Success
- Your Vision for Success

COMMUNICATING YOUR VALUE

- Nailing Your Niche
- Finding Your Fee Model
- Telling Your Story

VALUE U: DELIVERING DEEPER VALUE

- ACCOUNT
- CALENDAR
- COACHING CENTER ▾
 - COACHING CALLS
 - OFFICE HOURS
 - MASTERMINDS
- LEARNING CENTER ▾
 - LEARNING PATHS
 - LESSONS
 - LIBRARY
 - STRATEGIC PARTNERS
- GOOD VIBES TRIBE
- LOGOUT

Learning Paths

Learning paths bundle related courses into a specialized learning series with defined goals.

Search: Sort by:

CLARITY AND ACCOUNTABILITY

MINDSET MASTERY

TAKE CONTROL OF YOUR TIME

BETTER BUSINESS PLANNING

RELATING YOUR VALUE

BUILDING YOUR BRAND

PURPOSEFUL PROSPECTING

NAILING YOUR NICHE

Lessons

Sort by: 1 - 20 of 97

Search:

Categories:

- Growth (2)
- Advice and Planning (1)
- Personal Productivity (3)
- Client Services (2)
- Financial Performance (2)
- Operations (1)
- People (1)

RESET

9 STEPS SERVICE MODEL

AMAZON FBA PITCHING

BREAKOUT: FIND TURNAROUND & TRANSITION

BREAKOUT: PODCASTING

BREAKOUT: STELLAR SERVICES AND WALK AIDS

BREAKOUT: STELLAR SOCIAL MEDIA

YOUR VISION OF SUCCESS

EXPAND YOUR PERSPECTIVE & EXPLORE THE POSSIBILITIES

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

ACTION STEPS RESOURCES READING LIST

- Read "Your Vision for Success Guidebook"
- Complete "My Limitless Life" to create your vision for success
- Build your "Business Vision & Blueprint" and use the "1-Page Annual Business Plan" to set 3 and 1-year goals

Fill out your Big Why Form

LIMITLESS

Share your Big Why with your Tribe



LEONAABRAHAO

HOME

ACCOUNT

GETTING STARTED

FORMS ▾

GETTING TO KNOW YOU FORM

2024 ENROLLMENT FORM

CALENDAR LINKS

Q1 EVENTS

ADD TEAM MEMBERS & CO-MEMBERS

"BIG WHY"

CALENDAR

COACHING CENTER ▾

LEARNING CENTER ▾

GOOD VIBES TRIBE

MEMBERS DIRECTORY

"Big Why"

Complete the form

"Big Why"

Goal 1

ALLISON FOULK

COURSE OUTLINE

HOME

ACCOUNT

CALENDAR

COACHING CENTER ▾

LEARNING CENTER ▾

GOOD VIBES TRIBE

ADMIN ONLY ▾

LOGOUT



Lifestyle Accountability Room ▾

+ Add link



Your Big Why



Allison Foulk

Admin

Limitless

7 hours ago

Program & Content Manager

Kick off your 2024 coaching year by sharing your BIG WHY here.



Liked by Joseph and 2 others

PRACTICE DIAGNOSTIC

ALLISON FOULK

PRACTICE PRIORITIES
Assessment 2024

HOME
ACCOUNT
GETTING STARTED
FORMS
CALENDAR
COACHING CENTER
COACHING CALLS
PRACTICE DIAGNOSTIC
PRACTICE DIAGNOSTIC RESULT
SUPPORT
LEARNING CENTER
GOOD VIBES TRIBE
MEMBERS DIRECTORY
ADMIN ONLY
PROGRAM OUTLINE
LOGOUT

Mindset Mastery

LIVING LIMITLESS: THE 5 FREEDOMS (SEE LINK HERE)

I am living The 5 Freedoms and experiencing my full potential for success, happiness and impact.

Not at All True Mostly True Somewhat True Slightly true & untrue Somewhat True Mostly True Always True

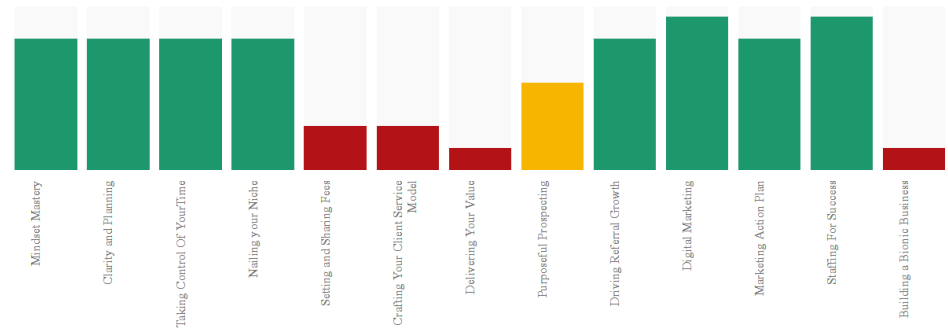
MANAGING MY MODE

I never feel stressed or overwhelmed and religiously operate in a positive, proactive mode.

Not at All True Mostly True Somewhat True Slightly true & untrue Somewhat True Mostly True Always True

[Previous](#) [Next](#)

PRACTICE PRIORITIES Assessment Results



GETTING STARTED

FORMS

CALENDAR

COACHING CENTER

LEARNING CENTER

GOOD VIBES TRIBE

MEMBERS DIRECTORY

ADMIN ONLY

PROGRAM OUTLINE

LOGOUT

LIMITLESS LESSONS & LIBRARY



Slides Transcript Audio

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

ACTION STEPS RESOURCES READING LIST

- Watch the "Taking Control of Your Time" lesson
- Read the "Taking Control of Your Time Guide"
- Complete the Above the Line – Task Transition
- Set your 2023 Annual Calendar (use Limitless calendar and your schedule)
- Draft your ideal Weekly Schedule and implement into 2023 calendars
- Set your daily schedule, checking email no more than 2x per day

ACTION STEPS **RESOURCES** READING LIST

Success Shifter Guidebook

Taking Control of Your Time Guidebook

2023 Calendar – Sample Destiny Capital

Above the Line – Task Transition

Above the Line – Task Transition (Sample)

Annual Calendar Template

Client Engagement Standards (Sample Tanya Nichols)

Client Engagement Standards (Sample Taylor Schulte)

Client Service Standards – Example

Corporate Engagement Standards (Sample Align Financial)

Email Delegation Process

Empire Writer – Atomic Habits by James Clear – Infographic

Ideal Weekly Outlook Calendar – Sample Jarrod Musick

Ideal Weekly Schedule – Sample Tiffany Charles

Marketing Activities Template (Sample Tiffany Charles)

Outsourcing Resource List

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

ACTION STEPS RESOURCES **READING LIST**

- Atomic Habits: An Easy & Proven Way to Build Good Habits & Break Bad Ones, James Clear
- Eat That Frog! 21 Great Ways to Stop Procrastinating and Get More Done in Less Time, Brian Tracy
- Essentialism: The Disciplined Pursuit of Less, Greg McKeown
- Getting Things Done, David Allen
- The 4-Hour Workweek, Timothy Ferriss
- The 7 Habits of Highly Effective People, Steven R Covey
- The Power of Habit: Why We Do What We Do in Life & Business, Charles Duhigg

Edit Content

< PREVIOUS MODULE

MARK COMPLETE

Limitless Library

ALLISON FOULK

COURSE OUTLINE

HOME

ACCOUNT

CALENDAR

COACHING CENTER ▾

LEARNING CENTER ▾

GOOD VIBES TRIBE →

ADMIN ONLY ▾

LOGOUT

LIMITLESS ▾

Lounge: General Chat ▾


+ Add link

Joe Forish a month ago
Financial Strategies for Tech Employees

November was another great month!

And I started my own RIA and I am currently transferring clients!! 😊

Nov Goals.pdf
1.62 MiB



Liked by Matthew and 4 others

Like Comment 3 comments

Estate Planning Attorney Around New York City Share ...

AM Abhi Mhatre Lifestyle - Virtual a month ago
Simplist, Husband and Father

Welcome Package



THE ANNUAL CALENDAR

SET YOUR VISION SCHEDULE FOR 2024



THE POST-ITS

STAY CLEAR AND FOCUSED TO ELIMINATE DISTRACTIONS...



JANUARY							FEBRUARY							MARCH							APRIL						
SUN	MON	TUE	WED	THUR	FRI	SAT	SUN	MON	TUE	WED	THUR	FRI	SAT	SUN	MON	TUE	WED	THUR	FRI	SAT	SUN	MON	TUE	WED	THUR	FRI	SAT
	1	2	3	4	5	6	4	5	6	7	8	9	10	3	4	5	6	7	8	9	7	8	9	10	11	12	13
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14	15	16	17	18	19	20	18	19	20	21	22	23	24	17	18	19	20	21	22	23	21	22	23	24	25	26	27
21	22	23	24	25	26	27	25	26	27	28	29			24	25	26	27	28	29	30	28	29	30				
28	29	30	31	*The only limits you have are the ones you place on yourself*									31														
MAY							JUNE							JULY							AUGUST						
SUN	MON	TUE	WED	THUR	FRI	SAT	SUN	MON	TUE	WED	THUR	FRI	SAT	SUN	MON	TUE	WED	THUR	FRI	SAT	SUN	MON	TUE	WED	THUR	FRI	SAT
		1	2	3	4		2	3	4	5	6	7	8	7	8	9	10	11	12	13	4	5	6	7	8	9	10
5	6	7	8	9	10	11	9	10	11	12	13	14	15	14	15	16	17	18	19	20	11	12	13	14	15	16	17
12	13	14	15	16	17	18	16	17	18	19	20	21	22	21	22	23	24	25	26	27	18	19	20	21	22	23	24
19	20	21	22	23	24	25	23	24	25	26	27	28	29	28	29	30	31	*The secret to success: life is a participatory sport*			25	26	27	28	29	30	31
26	27	28	29	30	31		30																				
SEPTEMBER							OCTOBER							NOVEMBER							DECEMBER						
SUN	MON	TUE	WED	THUR	FRI	SAT	SUN	MON	TUE	WED	THUR	FRI	SAT	SUN	MON	TUE	WED	THUR	FRI	SAT	SUN	MON	TUE	WED	THUR	FRI	SAT
1	2	3	4	5	6	7	6	7	8	9	10	11	12	3	4	5	6	7	8	9	1	2	3	4	5	6	7
8	9	10	11	12	13	14	13	14	15	16	17	18	19	10	11	12	13	14	15	16	8	9	10	11	12	13	14
15	16	17	18	19	20	21	20	21	22	23	24	25	26	17	18	19	20	21	22	23	15	16	17	18	19	20	21
22	23	24	25	26	27	28	27	28	29	30	31			24	25	26	27	28	29	30	22	23	24	25	26	27	28
29	30	*Expecting more is the first step toward experiencing more*																		29	30	31					



Success Shifts

- ELEVATE YOUR THINKING
- DESIGN YOUR MODEL PRACTICE
- TAKE CHARGE OF YOUR TIME
- BE CLIENTS' TRUSTED ADVISOR
- DEFINE & PACKAGE YOUR VALUE
- COMMUNICATE YOUR VALUE WITH CONFIDENCE
- STAFF FOR SUCCESS
- SYSTEMATIZE & SPECIALIZE SYSTEMS
- FIND YOUR GROWTH GROOVE

Beginner Trail Lessons

- Science of Success
- Your Vision for Success
- My Model Practice
- Action & Accountability
- Taking Control of Your Time
- Nailing Your Niche
- Telling Your Story
- Finding Your Fee Model
- No Stress Prospect Process
- One-Page Financial Plan
- Client Onboarding
- 5-Star Service Model
- Model Client Meetings
- Client Meeting Surges
- Referral Roadmap
- Rock Star Right Hand
- Optimizing Operations
- Choosing Your Channel
- Building a Breakout Brand
- Mapping Your Marketing Plan
- Cultivating COIs
- Client Referrals
- Websites that Work

2024

2024 GOALS
 # Work Hrs/Week _____
 # Days OOO _____
 # of Ideal Clients _____

Revenue _____
 AUM _____
 Avg Rev/Client _____

DON'T GET
OVERWHELMED

DO GET
ORGANIZED

YOUR GUIDEMAP Use this chart to easily track your progress through the Learning Paths each quarter.

LEARNING PATHS	TRAILHEAD LESSONS	Priority Level			ADVANCED LESSONS	Priority Level		
		Complete	N/A			Complete	N/A	
1 Mindset Mastery	The Science of Success	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Self-Talk for Success	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
					Relationship to Money	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
					Overcoming Overwhelm	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business Planning	Your Vision for Success	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Strategic Planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	My Model Practice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Run Your Practice Like a Business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Action and Accountability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Quarterly Business Review	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Taking Control of Your Time	Take Control of Your Time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Managing & Navigating Change	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Action and Accountability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Managing Firm Performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
					Draw Your Future	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2 Delivering Your Value	No Stress Prospect Process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Overcoming Overwhelm	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Amazing First Meeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Taking Your Story for a Spin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	One-Page Financial Plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Virtual Value: Video Experience	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
School of Advice	Model Client Meetings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Goals-Based Client Review	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Client Onboarding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	How Client Engagement is Being Disrupted	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	5-Star Service Model	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Communicating Your Value: Big Levers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Crafting Your Client Service Model	One-Page Financial Plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Story Telling as a Super Power	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Amazing First Meeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bridging the Behavior Gap	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
					Scary Markets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Securing and Scaling Your Value	Conscious Conversations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Goals-Based Client Review	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Client Meeting Surges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Guide Now Defractor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Client Meeting Surges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Star Service Model	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communicating Your Value	Client Meeting Surges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Star Service Model	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Client Meeting Surges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Star Service Model	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Client Meeting Surges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Star Service Model	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nailing Your Niche	Client Meeting Surges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Star Service Model	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Client Meeting Surges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Star Service Model	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Client Meeting Surges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Star Service Model	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

GET CLEAR
GET FOCUSED
GET TO WORK

LIMITLESS 20__ 1-Page Business Plan



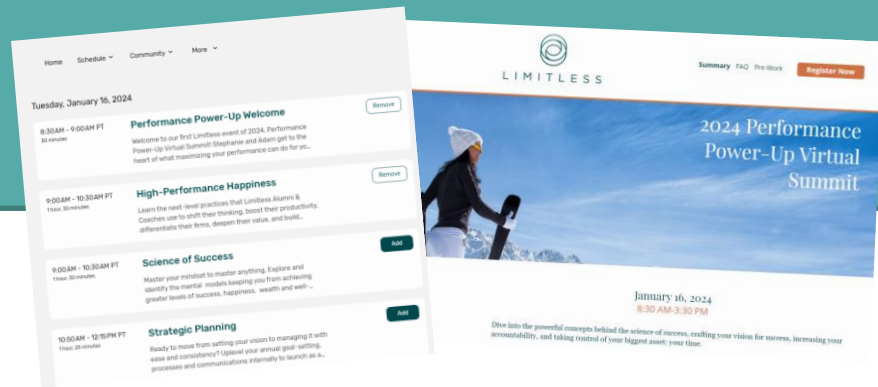
PERFORMANCE SUMMIT (Virtual)



January 16, 2024

Be sure to complete your registration if you haven't already.

Got Teams? Be sure to add your team members on the member website so they receive an invite to the Team Event Space in tribe.



- JOIN LIMITLESS TRIBE & POST YOUR BIG WHY (LEADERS)
- WATCH & COMPLETE PRE-WORK LESSONS
- COMPLETE PRACTICE DIAGNOSTIC, BRING TO JAN SUMMIT
- REGISTER FOR JAN. 16 SUMMIT
- REGISTER FOR MARCH WORKSHOP & RETREAT

YOUR CONSULTING CALLS



Jan: set business strategy & coaching plan for year



June: mid-year progress to assess strategy & stay on track



Oct: 2025 business plans and priorities; consulting guidance

YOUR 1:1 COACHING CALLS

Six (6) to use as you like to get help when and where it's most helpful to you



Practice Coach



Advisor Coach



Mindset Coach



YES, THIS IS A TEST

- THIS IS A THINKING QUIZ
- I KNOW ALL THE ANSWERS 😊
- YOU MAY NOT USE THE INTERNET
- THAT'S THE ONLY RULE
- READY, SET, YOUR 3 MINS START NOW!



1 history history history	2 R g rose e i n	3 MEREPEAT	4 _____ read _____
5 Arrest You're	6 M Meal M e e a a l Meal l	7 E more more more more	8 wonalicederland
9 me right	10 stefrankin	11 Chimadena	12 settle
13 millio1n	14 e ^d r ^d v ⁱ v ⁱ e ^d r ^d v ⁱ v ⁱ	15 land time	16 mini'lbethereute
17 R R a a i i l l	18 score	19 ban ana	20 o_er_t_o_
21 e t a d	22 Meal Λ	23 issue issue issue issue issue issue issue issue issue issue	24 XQQQME
25 time time	26 FLUBADENCE	27 1 knows	28 BIG BIG ignore ignore
29 BIRD	30 chair	31 ICE ³	32 lang4uage
33 VA DERS	34 9S2A5F4E1T8Y6	35 _____ it	36 chawhowhorge
37 RIGHT RIGHT	38 TULIPS	39 \$0 all all all all	40 knee light light

L I M I T L I

LIMITLESS.

TERMS & CONDITIONS

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

You simply have
to raise your
standards.



Q&A

