

LIMITLESS Coaching Call Transcript

February 5th, 2024
Lifestyle Coaching Call
Peak Practice

32
00:06:50.790 --> 00:06:53.469
Stephanie Bogan: How is everyone today?

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00:06:56.720 --> 00:07:02.970
Mark Vance: That enthusiastic? Huh? It's Monday. Hey, Mark, how are you today? How's it going, Stephanie?

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00:07:03.700 --> 00:07:22.830
Stephanie Bogan: It's going good. It's snowing. I can see it out my window. It was a beautiful blue bird day yesterday on the mountain, which was amazing. So, and we have another storm coming in. So it's probably just looking out my window like one of my Mondays and Tuesdays are hard because I block all my calls on Mondays and Tuesdays. So Wednesdays, Thursdays, and Fridays to do all my.

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00:07:22.940 --> 00:07:25.130
Stephanie Bogan: I call it quiet work or deep work.

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00:07:25.450 --> 00:07:51.449
Stephanie Bogan: So I just write hair in a body. You just sit down and you knock stuff out, which is great, and you also have a lot of flexibility. If it happens to be a good snow day to just right, hop out for a few hours and pick up later Mondays and Tuesdays. I can't do that because I have calls, and it is even though you do want a flexible lifestyle. It's really poor form to be like, yeah, I just didn't feel it today. The snow is better. It's like, especially when you live in the snow. It's not like you're suffering. So yeah.

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00:07:51.450 --> 00:07:56.550
Stephanie Bogan: yeah, it was a good weekend here. Anyone have anything really awesome this weekend, any fun adventures?

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00:07:58.090 --> 00:08:00.550
Mark Dutram: I had my 30 fifth wedding anniversary.

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00:08:00.830 --> 00:08:02.560
Stephanie Bogan: Oh, my God! Who said that

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00:08:03.290 --> 00:08:13.170
Mark Dutram: mark? That is you don't even look old enough to! Did you get married at like 15? I did 15



exactly.

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00:08:13.300 --> 00:08:21.459

Stephanie Bogan: I my uncle in law. I guess it's my uncle in law has been married for 50, 60 years

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00:08:21.690 --> 00:08:27.239

Stephanie Bogan: they got married when he she was 14, and he was 15

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00:08:27.420 --> 00:08:34.570

Mark Dutram: South Dakota, my in-laws, the same over 60 years, and he claims the secret to a long marriage is 2 words. Yes, ma'am.

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00:08:34.630 --> 00:08:53.260

Stephanie Bogan: probably very true. He needs to communicate that to my husband. Awesome. Well, any other 35 years is amazing, mark that is awesome. That is incredible commitment. We always my husband and I heard a quote once, I thought was really cool, which is, marriage isn't about feelings. It's about commitment.

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00:08:53.750 --> 00:09:01.040

Stephanie Bogan: Cause I have to imagine that you didn't feel like being married every day for 35 days for 35 years.

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00:09:01.210 --> 00:09:01.900

Stephanie Bogan: Yeah.

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00:09:02.180 --> 00:09:17.460

Stephanie Bogan: well, that's awesome. It's a little bit about the same formula for being successful in our practices, right? Just because we're not feeling it doesn't mean we shouldn't be doing it right. It's not about feeling. It's about a commitment and what you're committed to, hey, Adam? I see Adam here.

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00:09:17.590 --> 00:09:35.530

Adam Cmejla, CFP®: everybody happy Monday. You know, it is a a recovery day for me. I was in Denver last Thursday and Friday. I'm President of Fpa. Indiana. So we had our chapter Leadership Conference and silver lining ended up having dinner with Michael on Thursday night, so that made the trip a little extra enjoyable

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00:09:35.530 --> 00:09:55.640

Adam Cmejla, CFP®: but then got back late Friday night, and then hit the road to drive up to Chicago with Andrew and the girls for about 48 h at Great Wolf Lodge. So anybody that has kids and has done the great Wolf Lodge experience know that it is a. It is a very interesting dichotomy of an experience, because the kids have an absolute blast.

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00:09:55.670 --> 00:10:14.499

Adam Cmejla, CFP®: but Mom and Dad, like Cl. Eyes, are burning from chlorine after 45 min. It's so loud it's stimulus overload. And your first like thought after maybe 10 min, there is. Where's the booze?



But it was in all seriousness. It was a. It was a good trip. The kids had a blast, and it was a

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00:10:14.690 --> 00:10:34.700

Adam Cmejla, CFP®: it was kind of our family. Get together a holiday, get together with my wife's dad's side of the family, because, as most of us could probably attest, there are only so many weekends that work during the actual holidays for families to get together. This one got punted to the beginning of February. And here we are. So yeah. Got back late last night and rolling into a full calendar this week.

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00:10:34.990 --> 00:10:52.589

Stephanie Bogan: Awesome. So right? Yeah, that's life. Right? Work hard day hard. Have a good time. Go back to work Monday morning, no matter what. Yeah, that's always the the good time is, would you play hard until late Sunday night, and then on Monday I'm all I'm I've reached that age where I'm like. I like the recovery day in between.

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00:10:52.590 --> 00:11:05.009

Stephanie Bogan: you know, I used to vacation until the absolute last minute, and now I'm like, give me that day before home, so I can get myself settled and start. I like a little bit of Michael calls it. You guys will think this is so cute coming from Michael.

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00:11:05.240 --> 00:11:10.790

Stephanie Bogan: We were in one of our coaching calls, and we were, you know, and he's like breathy, he said, breathy.

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00:11:10.880 --> 00:11:27.800

Stephanie Bogan: right like we just want things to feel breathier and spaceier. I like that day. Great a couple of housekeeping items, registration reminders. If you and or your team have not go ahead and register for the value. Summit on March eleventh. So Alison knows that you are coming

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00:11:27.840 --> 00:11:35.230

Stephanie Bogan: it particularly important to register for the live events, if you, in fact, do plan in coming and having a seat

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00:11:35.280 --> 00:11:47.490

Stephanie Bogan: so the lifestyle delivering value workshops are on the twentieth and twenty-first of March I were going through half day each on mailing your niche, telling your story. No stress prospect process

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00:11:47.660 --> 00:12:04.880

Stephanie Bogan: service model meeting searches so for those of you that are in lifestyle bundle and have workshops included. We're gonna really between and dive into the key lessons that you really need to apply to get to that limitless practice in life.

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00:12:04.970 --> 00:12:33.349

Stephanie Bogan: And so workshops for those of you who are coming or phenomenal cause. We are not gonna be talking theory. Adam and I are. Gonna give you about 30 min of warm up and refresh. And then it's gonna be right. We're gonna dive in for a few hours, really breaking down those lessons,



working through them, workshopping, talking to your peers so that you can leave right on the 70 or 80 yard line, really knowing what you've built and design conceptually. And now it's just putting the fine touches on it and taking it back.

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00:12:33.530 --> 00:12:45.209

Stephanie Bogan: if you did not sign up for bundle, and you want to join us for a workshop. There are still a few of those seats available, so feel free to check in with the coaching inbox. If you're interested in joining us

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00:12:45.370 --> 00:12:59.990

Stephanie Bogan: to let the rubber hit the road. As we like to say, there are no excuses at workshops. There are only results. Upcoming coaching calls. We've got the breakthrough call tomorrow week 2 on mindset Makeover, for those of you that are doing that deeper dive

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00:13:00.040 --> 00:13:09.980

Stephanie Bogan: someone did let me know. We you guys know I totally wholly believe that feedback is your friend and someone let me know that they were a little frustrated, that they didn't know about breakthroughs in the beginning.

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00:13:10.120 --> 00:13:36.499

Stephanie Bogan: and they had to get it on their calendar, and they just had a miss which is a big deal cause it's recorded. So if anyone else has had any questions or concerns in your mind about that, I just wanna lead with abject radical honesty, which is, I decided at the last minute last year that I really wanted to do it. And we just had to get all the coaches and the dates together. So I think most of you have that information. Got that information. But if you did not

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00:13:36.590 --> 00:13:55.379

Stephanie Bogan: look at inbox insights or check emails from us. It is possible that you missed it. And I just wanna make sure that no one misses it and gets frustrated unnecessarily. So tomorrow we're digging into mindset makeover and really talking about self talk for success which will wrap up the mindset module. And then we're gonna be diving into vision.

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00:13:55.620 --> 00:14:12.819

Stephanie Bogan: If you haven't joined us for breakthrough, there's still plenty of time and the next 2 calls are around vision and diving deeper into that. So if you're not clear about the what or the how that'd be a great call to go to. And then our next call on mindset is personal peak on the twentieth with Coach Liz

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00:14:12.820 --> 00:14:25.920

Stephanie Bogan: which is just a great place to one. Learn and listen to come with actual issues and questions. If you are staring at a bank page and going, I don't know, I promise you.

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00:14:26.220 --> 00:14:39.380

Stephanie Bogan: That's a function of some headspace issue that you've got going on because lots of people just pick stuff and go. We've given you a map to get up and go. It means that there's some resistance if you're feeling overwhelmed. Still, if you're feeling frustrated.



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00:14:39.380 --> 00:15:00.330

Stephanie Bogan: it means we've done exactly what we need to do, which is surface the resistance standing between you and action. If you don't know what it is, but you're feeling it. Go to that call. That's what it's for. Let's unstuck you, or at least help you find that next best step. You can also always just jump on tribe. I've been on there a lot. Adam has the coaches have

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00:15:00.330 --> 00:15:31.710

Stephanie Bogan: man. Some very specific actionable conversations are happening on tribe just reading them can elevate your practice. So there's just great stuff going on there right now. So kudos to those of you who are jumping in and asking questions cause you're getting really specialized advice from me and the other coaches to take that action. So if you haven't done that. Your number one action item this week is to get yourself on tribe. If you tell yourself I'm not a tribe person, I want you to replace that with, I'm not a get great value for the fee that I'm paying and elevate my live person.

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00:15:32.790 --> 00:15:37.190

Stephanie Bogan: cause you're online all the time. It's a possibility.

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00:15:37.300 --> 00:15:49.820

Stephanie Bogan: and then, as usual, use zoom for today's QA. And then Alison will make sure that Adam and I get to those sometimes, cause I just have my double screens, Alison. So just let me know if you've got questions popping up

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00:15:50.140 --> 00:15:59.869

Stephanie Bogan: alright. Any other housekeeping items, Alison, did I miss anything. Anyone else have any amazing announcements? All right. Who's going to win for the week?

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00:16:00.960 --> 00:16:10.099

Stephanie Bogan: Who's had a win since they started? I know there's a few of you. I've seen them on Tribe Mary Ann. Unmute yourself and share your win with your tribe.

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00:16:10.570 --> 00:16:26.019

Marianne Nolte, CFP®: I sent out my new fee schedule and all but one person has responded with a thumbs. Up, sign the docuSign. We had good meeting reviews and talked through the fact that I had sent them a docuSign, so they actually

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00:16:26.130 --> 00:16:31.590

Marianne Nolte, CFP®: absorbed it. They understand the fee change. They understand the why of the fee change.

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00:16:31.650 --> 00:16:41.539

Marianne Nolte, CFP®: I am stuck on the one person, and so I'll probably let I did try and look at firing clients on tribe.

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00:16:41.590 --> 00:16:47.420

Marianne Nolte, CFP®: and I didn't get a whole lot. I ended up on Xypm Forum for that, and I got a



good

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00:16:47.500 --> 00:16:49.340

Marianne Nolte, CFP®: by our client.

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00:16:49.420 --> 00:16:51.580

Stephanie Bogan: letter that I out.

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00:16:51.710 --> 00:17:04.529

Stephanie Bogan: Well, one that's a fantastic win. And it's February fifth. So we're 30 days in, and you've right pulled a really big lever. Adam certainly knows how big a lever that can be to pull

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00:17:04.530 --> 00:17:29.020

Adam Cmejla, CFP®: I don't think I did, my fee raised until, like August. So I think February fifth might take the cake as being the absolute, quickest point of execution from concept to actual implementation. So that is awesome, awesome. We're gonna talk about it in a little bit. But those of you that are waiting for some giant perfect plan to unfold before you take your next step. That is not the way

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00:17:29.200 --> 00:17:36.390

Stephanie Bogan: to make progress. So we're gonna talk a little bit more about that, Steve. And misty. Were you guys just high 5 in Maryanne? Or did you have a win to share, too?

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00:17:37.130 --> 00:17:39.540

Misty Lynch: Yeah, one to share

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00:17:39.750 --> 00:17:44.509

Misty Lynch: Since the last meeting? I hired somebody to

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00:17:44.540 --> 00:18:00.199

Misty Lynch: read my emails and answer the phone and screen that out. So I hired my mom. He was working for my dad before he passed away, and she was feeling kind of bored and and you know, kind of didn't like really not having anything to do during the day, so

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00:18:00.250 --> 00:18:14.990

Misty Lynch: set her up and got her on board, and so now she's happy, I'll be able to pay her and and I'm gonna get a little bit of time back, which will be good. Well, that's awesome. I love that you're taking action there congrats like sometimes it's just the first step is just momentum fly while getting moving.

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00:18:14.990 --> 00:18:39.719

Steven Fronrath: Truly. Steven, how about you? Was that a high 5, or did you have a win, too? No, I mean, I guess it all can also be a high 5, but also had some good wins, I think, on that momentum with the flywheel we we, we got really clear on our minimum fees for each of our different clients segments. We have yet to do the reprising on there, but just getting clear for us. We moved a lot of those folks internally, and it made us feel a heck a lot heck of a lot better.



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00:18:39.720 --> 00:19:05.780

Steven Fronrath: as far as how many clients were serving in each of those segments. That was really great to get that clear. And then we blocked out our search schedule for the entire year on our calendars and all of our teams calendars, and then we just introduced that to the whole team, as of 100'clock Eastern this morning, and they were all on board for it. So excellent. Yeah. You should definitely attend the meeting surge lesson at Summit, or go back and watch that with your team

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00:19:05.830 --> 00:19:32.170

Stephanie Bogan: the first one's the roughest, as we like to say. It's sort of like getting back into the gym for the first time. Adam will tell you. Your peers will tell you the more you prep on the front end and follow up, man, just be sure that you got a plan for follow up. So there's a lot of great content and resources there. I think, Adam, you're doing this summit session on surges. I believe so. Adam can give you all his tips and tricks as well, cause he's been doing it for what? 5 5 years? 6 years.

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00:19:32.590 --> 00:19:54.669

Stephanie Bogan: Well, I'm great. I'm glad to hear. I know there's a lot more wins out there definitely post them on tribe. We're starting a new thing where we're gonna go in each week and look at wins that are shared and give away swag cause you guys know I love giving away limitless swag. I'm always looking for new fun, swag ideas. So if you're ever like sitting around going oh, that would be cool, swag! Let us know

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00:19:55.210 --> 00:20:00.249

Stephanie Bogan: cause we like giving away. Swag right. You're part of the community. All right. Who's ready for today?

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00:20:02.250 --> 00:20:11.100

Stephanie Bogan: I didn't hear any whoop whoops! I just feel like my little energy battery just went. I tell my kids, I run on love for you guys. I run on whoop! Whoops like whoop! Whoop!

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00:20:11.420 --> 00:20:36.710

Stephanie Bogan: Alright! Thank you, Tim. I appreciate that, Tim's I got Don. I got Don giving me hands. I love it. Don. See, you guys are gonna do great things this year. Alright welcome to this month's lifestyle peak practice coaching call as will be the case for the balance of the year. These calls are really focused on your practice and unpacking the strategies, those solutions, the shortcuts.

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00:20:36.730 --> 00:20:58.990

Stephanie Bogan: the hacks that can really help you apply what you're learning will talk about. Topical things will bring in outside guest which we're doing today. We'll bring in cool concepts this first quarter. We're really gonna focus, as you've noticed, between this, the call topics and breakthrough. We're really focus you on creating more mind awareness clarifying that vision.

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00:20:59.050 --> 00:21:06.860

Stephanie Bogan: building happy what I like to call happy, high performing habits and accountability systems. Right? Those are those stakeholders in your success.

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00:21:06.940 --> 00:21:17.750



Stephanie Bogan: And look, there it is. I'm so excited I'm ahead of myself today. Right? Clarifying your vision is your number one goal that does not mean you need a 90 page business plan with every detail.

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00:21:18.120 --> 00:21:33.690

Stephanie Bogan: It means you need something to galvanize your resources and focus on forward. It doesn't have to be a big growth number. It can be my big Y. By the way, when I was younger, right? There was all kinds of income and money tied to it, and then you get to a point

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00:21:33.690 --> 00:21:53.250

Adam Cmejla, CFP®: where it just changes. Adam, how many times is your big Y changed over the last 5 6 years? So it's actually a really relevant question, because that's I don't remember exactly who it was. I apologize. If likely, on the call here someone posted that exact question and tried. It's like, How is your why changed over the time? And yeah, at the very beginning it was about

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00:21:53.250 --> 00:22:06.779

Adam Cmejla, CFP®: there. There was that very tangible direct reason. Yeah, it was all in 100,000 plus I mean, it was 140 all in when you took my wife's benefits, you know, the plus plus plus plus plus plus plus that comes with that comes with earnings. But

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00:22:06.780 --> 00:22:33.710

Adam Cmejla, CFP®: as you start kind of working, I always thought there was like this version of Pavlov's hierarchy or Pavlov. That's Pablo's the the bringing dog Maslov's another different love Maslov's hierarchy of needs right the business version of that I feel like we could all probably create a different pyramid around that. For my again, my personal example, that base pyramid was an exact, quantifiable, direct.

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00:22:33.710 --> 00:22:40.349

Adam Cmejla, CFP®: solvable problem I needed to make X, now that we filled that basic bucket of

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00:22:40.350 --> 00:22:59.800

Adam Cmejla, CFP®: refinishing that. And we've got our saving strategy. And then all the you know, check, check, check. If I put myself as as a client. Now you start thinking about your business a little bit differently around the different freedoms that you can obtain, and the different types of impact there, I say, a cliché buzz word, right? I wanna have more impact. But in all honesty, that's

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00:22:59.800 --> 00:23:19.250

Adam Cmejla, CFP®: that's just the evolution of what I personally experience. As the business continued to mature, and I matured with it as a business owner and as an advisor and a coach and all the different hats that I've worn. So now it's a matter of having more positive impact at scale in the optometric space. But here's what I will say.

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00:23:19.340 --> 00:23:20.949

Adam Cmejla, CFP®: and this is.

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00:23:21.060 --> 00:23:28.290

Adam Cmejla, CFP®: I'll make this last point and emphasize just how beneficial it was to be clear upon



this

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00:23:28.430 --> 00:23:58.339

Adam Cmejla, CFP®: I know what I want the end result for the business to look like. I know what I want the business to look like. More importantly, I know what I don't want. I know myself enough to know that I don't want a big team. I don't want to be like Sess Street or Matt Adams, friends of ours from mission wealth like Godspeed and good luck. They are phenomenal at running big enterprise firms, Ron Carson, awesome individual, and I'm not even remotely trying to put myself on in that aura or in that playing field. But I share that because

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00:23:58.460 --> 00:24:07.190

Adam Cmejla, CFP®: those are advisers turned entrepreneurs that wanted to build a scalable and enterprise type practice. I don't want that.

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00:24:07.260 --> 00:24:21.959

Adam Cmejla, CFP®: I want a team of 5 people, and we'll figure out the rest after that point. So I guess I share all that, because my team shared with me at our last strategic planning retreat, how beneficial and how comforting it was for them to know

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00:24:22.120 --> 00:24:39.969

Adam Cmejla, CFP®: what my end game was in the practice that when we get to this mark that's gonna be the business right now, now, do I reserve the right to change that? Of course I do. That's one of the benefits that we have as business owners. But I can say right now, sitting in the seat, that I'm pretty darn convicted and clear

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00:24:40.000 --> 00:24:46.259

Adam Cmejla, CFP®: that I know what I want the practice to look like, and therefore I also know what I don't want it to look like so

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00:24:46.280 --> 00:25:08.710

Adam Cmejla, CFP®: long winded explanation. Give yourself permission to know that the vision that you set for yourself today the of where you're at right now is likely not going to be the same. V. 2, v. 3, vision 2, vision 3. As you progress in the practice. But what will likely happen as you go through that process is, you will start getting a better understanding of what you don't want it to look like going forward.

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00:25:09.590 --> 00:25:18.249

Stephanie Bogan: I love that the big why not right? I didn't start my practice to be overwhelmed, to be under appreciated by my clients, to have to defend my fees.

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00:25:18.400 --> 00:25:22.020

Stephanie Bogan: that I don't think anyone joined for that right? So

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00:25:22.100 --> 00:25:40.649

Stephanie Bogan: that big why gets right, more and more inspirational and less and less functional as you go. I think I shared with. I think someone or maybe it was you in the last call. Right? My big Y right now literally, is to live a big, bold, bad as beautiful life that lets me live and work on my terms, and while



having impact and to help others do the same.

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00:25:40.810 --> 00:25:42.869

Stephanie Bogan: that's the call forward

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00:25:42.930 --> 00:26:01.049

Stephanie Bogan: right? My mission at a business level is to help growth. Minded founders and right advisors elevate their work, wealth and well, being right, the vision right is to build a certain kind of company like you're just kind of iterating that what is pulling you forward? Because what we're really talking about this month is implementing change.

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00:26:02.050 --> 00:26:31.689

Stephanie Bogan: And I think you probably know by now that the odds of change are stacked about 9 to one against you, which is right in that 99, 90 to 95%, right? Habit zone that we talk about. If you spend 95% of your time in a habit zone and you're 95% likely to do today what you did yesterday, according to the research, what are the odds that you're actually gonna implement change. That's what limitless is. It's a pattern interrupt where some part of you said.

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00:26:31.830 --> 00:26:52.040

Stephanie Bogan: enough. I'm ready for the more and better that, I believe, is available to me. I'm going to go out and get some help and figure it out that, by the way, is exactly what your clients do. So implementing change is about recognizing, like, once upon a time we used to make fires by rubbing sticks together in a cave. And now we've got a biclider or a blowtorch.

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00:26:52.110 --> 00:27:05.579

Stephanie Bogan: So it's really about, how do we work to clarify the changes we want to make to Adam's point with contrast. We know what we do want when we know what we don't want. And then how do we really start to make sure that we're together putting those into practice.

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00:27:06.220 --> 00:27:10.379

Stephanie Bogan: Honest engines. Time! How many of you are feeling a little bit overwhelmed?

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00:27:12.870 --> 00:27:13.610

Stephanie Bogan: Right?

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00:27:14.300 --> 00:27:20.539

Stephanie Bogan: Most year. One people, the first quarter they're like, it's like going to Disneyland for the first time.

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00:27:20.560 --> 00:27:26.289

Stephanie Bogan: You've got a map, but usually like, do I go to this neighborhood, or do I go to that neighborhood? You've got the map.

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00:27:26.420 --> 00:27:45.030

Stephanie Bogan: but you haven't had the experience yet. That discomfort and that. O uncomfort that



overwhelm you fear is your brain's version of the uncertainty story. When we start something new we loved have the beginning, the middle, and the end completely mapped out. It increases the probability right that we don't get eaten along the way.

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00:27:45.300 --> 00:27:59.539

Stephanie Bogan: The problem is, if we prescribe this exactly right for each of you, you'll all be on the exact same track, which is cool except what Dave needs in Quarter 2 is going to be different than what Steve needs or what Valeriana needs.

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00:27:59.710 --> 00:28:14.139

Stephanie Bogan: Right base camp is when we're all together making sure we've got those foundations in place, and then you each kind of get to flow up the mountain from there through each of the summits. So just understand that that resistance that you're feeling

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00:28:14.910 --> 00:28:23.290

Stephanie Bogan: is uncertainty. It's doubt it's your brain saying something's changing. I don't feel prepared for it.

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00:28:23.320 --> 00:28:30.470

Stephanie Bogan: I'm going to give you a reaction that says right, stress, threat, danger. and your job is to get away from it.

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00:28:31.130 --> 00:28:43.320

Stephanie Bogan: And you're doing the exact opposite thing. You're gonna do. What anybody remember Driver's Ed? Is anyone else old enough to have been through actual driver's ed where they sat? You in the box. Thank yes, it's not just me

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00:28:44.040 --> 00:28:56.840

Stephanie Bogan: in Driver's edge. Do you remember the video? I don't know why I remember it, but I remember it vividly videos on the screen. We're on like ice and snow. This is the first time in my life I've ever lived in weather. I've always lived in sunny places. So it's finally coming to bear.

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00:28:57.090 --> 00:29:07.850

Stephanie Bogan: And I remember the instructor. You know they're like, when you a hydroplane, you turn into the skid, which means you turn the direction that you're veering out of control, which feels completely and utterly what

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00:29:09.240 --> 00:29:25.579

Stephanie Bogan: unnatural your brain is like. Go the opposite way. When you're turning into this kid. It's the worst thing that you can do, and I remember we're dry, you know. We're driving. Ha! Ha! Along, and we hydroplane and I turn away from this kid and I the guy's like right over my shoulder, and he's like, turn it.

133

00:29:25.640 --> 00:29:29.239

I was like traumatized. I was like, Oh, my God.



134

00:29:29.400 --> 00:29:39.469

Stephanie Bogan: but I remember it to this day, and it always reminds me of the change process your lean like. We're asking you to do the opposite of what feels safe and comfortable.

135

00:29:40.030 --> 00:29:48.770

Stephanie Bogan: Of course you feel overwhelmed. You just put your brain on. Notice that you're about to turn everything upside down, and you don't have a 97 page map.

136

00:29:49.120 --> 00:30:06.960

Stephanie Bogan: By the way, no one has that map. I don't have it. Adam doesn't have it. We're giving you a huge rate like, step up in the map that we're giving you. We're gonna work with you to connect the dots and how you navigate that map, and that's the piece where you have to lean into

137

00:30:07.120 --> 00:30:08.409

Stephanie Bogan: the discomfort.

138

00:30:09.490 --> 00:30:12.200

Stephanie Bogan: embrace this feeling

139

00:30:12.470 --> 00:30:21.600

Stephanie Bogan: literally. If you try to push it away or stuff it down, that resistance grows you get. Did you notice you get more frustrated or more overwhelmed? It's wow!

140

00:30:22.330 --> 00:30:30.189

Stephanie Bogan: How am I feeling? Feeling? Not good? Steph said. If I feel not good, that's the clue to check. In. What am I not feeling good about? I feel overwhelmed.

141

00:30:30.220 --> 00:30:38.580

Stephanie Bogan: I don't know what to do next, or what about this or what about that. And then your brain just starts chirping in your ear. Is this about how it's going for you guys? For some of you.

142

00:30:40.130 --> 00:30:48.690

Stephanie Bogan: The power question is what's my next best step. So I'm going to show you in a minute. We there is a map. You can just follow the map.

143

00:30:48.890 --> 00:31:03.119

Stephanie Bogan: You can't follow the map. If you can't see the map through the background noise, it's like it's dark and it's raining. That's your brain. Putting the scary monster. It's dark. It's raining. You've got the visor down and this tiny little dim flashlight, and you're trying to find the map.

144

00:31:04.870 --> 00:31:17.340

Stephanie Bogan: That's why the overwhelm story doesn't serve you. It's our job to sit in a space and say, absolutely, I'm feeling overwhelmed. I'm feeling uncertain what is behind that feeling. What's happening. Really, Jeremy, what's happening. Really, Margaret.



145

00:31:17.570 --> 00:31:33.959

Stephanie Bogan: I don't know what to do next, and I'm afraid that I just blew a bunch of money, or really behind that, maybe I'm even more afraid that nothing's gonna change. And I'm gonna be stuck where I'm at and that sucks. And I wanna feel that way I'm gonna get mad about it. I'm gonna frustrate. I'm gonna get overwhelmed. I need to do something about it. And since I don't know what to do.

146

00:31:34.080 --> 00:31:38.340

Stephanie Bogan: right, fear, uncertainty, doubt, anxiety, and stress seem like pretty good responses.

147

00:31:38.380 --> 00:31:50.739

Stephanie Bogan: That's Alison. Can we mute whoever's having a very lovely right that discomfort means? Are you ready for this?

148

00:31:51.230 --> 00:32:04.039

Stephanie Bogan: It means that your up level is calling. It means that you don't know how to get to that up level surprise. Most people don't. That's why there's coaches and consultants. and it's uncomfortable as you figure it out.

149

00:32:04.740 --> 00:32:16.250

Stephanie Bogan: Adam, have you been uncomfortable in your life as part of your success like once you got it figured out in quarter one did everything just flow perfectly and seamlessly from there. Perfect map, no problems.

150

00:32:16.690 --> 00:32:25.800

Stephanie Bogan: If you don't get get comfortable, being uncomfortable, no progress or change can happen, which is why you're going to hear us constantly say, What's your next best step?

151

00:32:26.050 --> 00:32:46.549

Stephanie Bogan: A micro action keeps your brain from freaking out. Hey? You know what? I'm gonna go back through the last call. And I'm gonna listen for what my next steps are. Hey? I'm gonna do that email thing. Hey? I'm gonna that's what starting today, I will is all about is just Adam loves the story of the momentum flywheel right from was which one hedge the hedgehog book.

152

00:32:46.590 --> 00:32:52.130

Adam Cmejla, CFP®: Jim Collins. Flywheel, right? The flywheel!

153

00:32:52.150 --> 00:33:04.550

Stephanie Bogan: That's our job. Once you get the fly will turning, Adam doesn't sit around now. Going. Oh, my God, what he just goes. What's the problem? What do I have to count for? Do I know the answer? Can I get the answer? Can I ask somebody to help me with the answer. Let's go.

154

00:33:05.190 --> 00:33:14.770

Stephanie Bogan: It's not overwhelming anymore, cause he's done it probably 150 times at this point. Right? So you're getting in the habit of identifying the feeling.



155

00:33:15.020 --> 00:33:19.020

Stephanie Bogan: Notice, there's a feeling identifying what's behind it.

156

00:33:19.420 --> 00:33:31.240

Stephanie Bogan: figuring out what you need to account for. Some of you, for example, went on tribe and said, I'm really overwhelmed, and you got some very personal responses and went. Oh, my God, that was amazing! I don't feel overwhelmed anymore.

157

00:33:33.400 --> 00:33:45.890

Stephanie Bogan: Then you can figure out how to take action any time that you're stuck. You just hear, especially you ask for help. If you're not asking for help, said with love there's a reason because there's no lack of offering on this side.

158

00:33:46.400 --> 00:34:06.580

Stephanie Bogan: There is a way you can come to a call. You can go on tribe you can email and like, there, if you ask for help, you will get help. So this is just your opportunity to check your overwhelm story and recognize this because we're about to drop you right? We're dropping you in a foreign country. You've got a basic map, and you're gonna have to figure out how to get to the other side.

159

00:34:06.650 --> 00:34:09.580

Stephanie Bogan: This is entrepreneur training

160

00:34:11.199 --> 00:34:21.369

Stephanie Bogan: it's going to at moments be really uncomfortable. It's what we do with a discomfort that's going to determine the level of success that you create this year. A number of you, Leland Matt.

161

00:34:21.400 --> 00:34:47.679

Stephanie Bogan: have gone on. And who did the Coi, someone was like, I'm focused on Coi campaigns. While I get my plan put together, I went off and got a list of all the podcasts that talked about how to work with cois and put it together. And I'm gonna listen to like I think it was like one a day every day. Do you know how much knowledge is good, and a like inspiration and ideas is how to build relationships is gonna come out of that action step. I could not have prescribed that

162

00:34:47.929 --> 00:34:55.440

Stephanie Bogan: to everyone. Right? It's how you're gonna interpret it and apply it. So as we go through kind of this conversation.

163

00:34:55.500 --> 00:35:06.110

I did create the shortcut for you. I sat down in 7 s and said, Alright, if I'm implementing these lessons cheat sheet, these action items are on the website.

164

00:35:06.590 --> 00:35:10.419

Stephanie Bogan: but seeing it in one place gives your brain something.



165

00:35:11.270 --> 00:35:33.859

Stephanie Bogan: It gives your brain something that says, Oh, okay. So we'll put this on the lessons. We'll put it in inbox insight. But if you are really stuck for the actions around the vision, time and accountability, which is that focus this quarter. Here is an action plan, step by step, that you can follow again the actions, the resources, etc., are in the library under each lesson.

166

00:35:34.080 --> 00:35:38.249

Stephanie Bogan: but if we organize it for our brain. It calms down.

167

00:35:39.790 --> 00:35:42.459

Stephanie Bogan: Does anyone feel better just seeing it on a page?

168

00:35:44.760 --> 00:35:54.249

Stephanie Bogan: It's weird, isn't it? Like all I did was go. I'm just going to take the stuff on the pages we gave them, and in the call I'm just going to put it in the action plan. And I was like, oh, that's the missing piece

169

00:35:54.820 --> 00:36:15.400

Stephanie Bogan: now, future summits, because we're not all gonna be on the same page. You're gonna have to create your own action plan based on, hey? I thought service model and fees were where I need to spend my time this quarter. That's obviously what's gonna be on my action plan that's called discernment and judgment. And that's also a skill we wanna help you develop this year because you're gonna be doing it a lot as you own a business

170

00:36:15.860 --> 00:36:18.139

Stephanie Bogan: like every day for the rest of your life.

171

00:36:19.260 --> 00:36:31.099

Stephanie Bogan: and Adam and I will both tell you. You don't always know the right answer, Matt, Michael and I, you guys, I'm working on this really fun. 10 x idea. Right? Be really cool. Michael and I were having a brainstorming, a session about it. This will make you feel so much better.

172

00:36:31.470 --> 00:36:34.029

Stephanie Bogan: I asked Michael a question, and do you know what he said?

173

00:36:34.690 --> 00:36:46.260

Stephanie Bogan: I don't know. I don't know if people will do that. And he said, What do you think? And I said, I don't know. It seems cool. I think it's going to be awesome. I have no idea if people will do that or pay that we haven't done it before. He's like great. Let's go figure it out.

174

00:36:48.430 --> 00:37:08.699

Stephanie Bogan: Michael and I sat in a call and went. I don't know. Do you know, Nope, I don't know. Let's figure it out together. It never. The figuring and out part never ends. No one's ever going to give you a formula and a map and say, Rasha, if you follow these exact steps, I guarantee you it's going to be okay. If that existed, it would cost a lot more, and everybody would be awesomely successful.



175

00:37:09.900 --> 00:37:22.919

Stephanie Bogan: Right? The differentiator between Adam and whoever doesn't achieve right or me or the next person is that we're simply willing to do things that less successful or unsuccessful people aren't willing to do

176

00:37:23.290 --> 00:37:27.189

Stephanie Bogan: that gap. That pause, that hesitation stops us.

177

00:37:27.520 --> 00:37:47.359

Stephanie Bogan: So there is an action plan for the quarter. You're gonna start to see it everywhere. We're also putting together action plans for each of the summit lessons going forward. I don't know if you can see this very well. I'm literally right now going through the process with the team. Right, you're gonna watch the lesson, review the guidebook and explore the resources. That's the same for everyone.

178

00:37:47.400 --> 00:37:56.559

Stephanie Bogan: And then it's going to be complete. This worksheet to do this thing so that you can. So we're gonna really, we hear you. And we're constantly every year iterating.

179

00:37:56.570 --> 00:38:07.729

Stephanie Bogan: We, too, don't have it all figured out how to write, show you the map around each lesson and help you put that together in your own personalized way. Alright, does that help a little bit

180

00:38:10.070 --> 00:38:20.850

Stephanie Bogan: most important. If you're feeling unclear, overwhelm like, Hey, I'm I'm not overwhelmed. I just need to figure out what to do next. Understand that those unanswered questions are a signal

181

00:38:21.350 --> 00:38:23.859

Stephanie Bogan: to step into that space.

182

00:38:24.910 --> 00:38:43.670

Stephanie Bogan: Ask us a question, pick something and go talk to a peer. That is your sure tail sign that you need to turn into the skid and do something. So the signal to your brain is the response to uncertainty and overwhelm is not panic and freak out the response to uncertainty and overwhelm is getting clear, getting focus and getting to work.

183

00:38:43.770 --> 00:39:02.869

Stephanie Bogan: And if you can do that like Adam right at some point, you won't think this part will be like a non-starter. It'll just be like, what am I working on next? So hopefully? That's a little grounding on the theme of today's call, which is implementing change. How do you take moving parts with or without limitless?

184

00:39:03.270 --> 00:39:20.239

Stephanie Bogan: Without us it would be more overwhelming. W. You just wouldn't see all the parts at



once. How do you pull those together? Think of like a connect? The dots puzzle? We've got all the dots you're gonna draw the lines. And so the really exciting thing is, each of you is going to do that in a slightly different way.

185

00:39:20.390 --> 00:39:37.750

Stephanie Bogan: So our guest today. Jed is on the line, Levine, who's also at one of our alumni. He's in the program again this year, and we asked Jed to join us to share how he iterated and organized and dot-to-dotted, if you will, some of those Q. One concepts

186

00:39:37.780 --> 00:39:40.430

Stephanie Bogan: around. How could he

187

00:39:40.550 --> 00:39:58.840

Stephanie Bogan: just organize them and capture them and codify them in a way that really resonated with him, and helped him to get his flywheel turning so this is a really good example of how to translate ideas on your own, and then, when we see good ideas, we come back and we share them with you. So, Jed, are you on the line.

188

00:39:59.620 --> 00:40:00.800

JedLevene: I'm here.

189

00:40:00.820 --> 00:40:02.180

Stephanie Bogan: All right, sir.

190

00:40:02.620 --> 00:40:14.300

JedLevene: Do you? Do I need to turn control over to you, or do you just want me to be your Vana? I think. I think I can kick you out of your screen share and take over, I think.

191

00:40:15.110 --> 00:40:16.850

JedLevene: how's that?

192

00:40:16.900 --> 00:40:34.150

JedLevene: Okay, perfect. Alright? So, yeah. Well, thanks a lot for having me like said in in the video intro, this was just a tool I put together as a to serve as like a a touchstone to keep me grounded in limitless, especially my first year.

193

00:40:34.240 --> 00:40:51.090

JedLevene: where there's just so much information, and there's so many awesome things that you could be doing. And you want to start 50 things and accomplish nothing. So this really helped to to slow me down and really get me focused on on that foundation.

194

00:40:51.140 --> 00:41:06.739

JedLevene: And the other thing that it really helped, too, was that so many different lessons relate to each other? I was finding in a ways like you know what I wrote down these numbers over here when I did this lesson. But now I'm writing down a different number here, so this help tie it all together.



195

00:41:06.960 --> 00:41:27.049

JedLevene: And I did find, and I don't know that this is necessarily a bad thing. Is that the the first time I went through these this, these exercises, which are which are now known as the the base camp lessons I really felt I was going just going through the motions like I just was getting an answer down to get an answer down. And I think that's really okay.

196

00:41:27.050 --> 00:41:42.870

JedLevene: Because when you put something out there. Then I think mentally, you start trying to defend that, you know. Like, is that really important to me? And some things were and some things weren't. So the the biggest turning point for me in limitless. My first year was around April

197

00:41:42.920 --> 00:42:03.169

JedLevene: when I went back and did these lessons, I completed them. But now, having sat with what I had written down originally, it gave me a really good picture of you know what? This is truly very important or this other thing. Yeah, maybe not so much. I think I wrote down because it sounded good. But it's not really serving me in any big way.

198

00:42:03.360 --> 00:42:29.279

JedLevene: And I'm sure, like a lot of people when you join limitless, you hear about all these awesome tools and spreadsheets and all this great stuff you can implement. And I was very much only interested in that. But I quickly learned well until April to learn like it's a third of the year that without without the vision. Without the you know, the tracks for the training or run on it makes that other stuff a lot more difficult. Yes, it's still good.

199

00:42:29.510 --> 00:42:37.449

JedLevene: but I wouldn't have the same conviction in. Why I'm doing a one page plan. Why, I'm doing search meetings

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00:42:37.640 --> 00:43:03.929

JedLevene: if if it weren't that it were fitting into my vision right? Don't do search meetings, because search meetings are fun and cool. We do surge meetings because it creates time right? And I think I hope it's one of Stephanie's most popular articles, the one on having agency over your time that that was a really important one for me to read. So if if you haven't read that one, I think it's one of the best

201

00:43:04.420 --> 00:43:06.940

JedLevene: so

202

00:43:07.370 --> 00:43:23.930

JedLevene: I haven't changed my my big. Why, in a couple of years. It still really serves me either that or I'm writing Stephanie's target market of slow learners with deep pockets, because it's it's kind of been holding for me and it it's still super important to me.

203

00:43:24.000 --> 00:43:31.299

JedLevene: I felt I was just doing so many different things, and I just really wanted to simplify my practice



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00:43:31.450 --> 00:43:46.370

JedLevene: so that I could create time, opportunities and great experiences for myself and the people in my life. And I really do live that. So when it comes to creating a great experience with my kids, sharing a great experience with friends and family.

205

00:43:46.570 --> 00:43:47.510

JedLevene: that's

206

00:43:47.710 --> 00:44:11.019

JedLevene: totally one of the areas where the budget doesn't matter as much. We're gonna make time for it. And I certainly have no regrets, you know, when you have young children, you think you're you're never gonna get out of parenting, and my kids are 12 and 14. Now it takes a little bit of a Starbucks and blue lemon persuasion to get my daughter my 14 year old to hang out with me so

207

00:44:11.020 --> 00:44:36.389

JedLevene: yeah, can't take that time for granted, for sure. So that that's my big why. And I think about every day all these things I'm doing to create time is that's the time I'm gonna go skiing with my kids. That's a time I'm gonna go scuba diving with the kids. That's the time I'm just, gonna you know, walk with my kids to school because I'm going a half hour late. That

208

00:44:36.440 --> 00:44:47.610

JedLevene: you know, it's it's maybe not as sexy as I wanna make, you know, 10 million dollars a year and take a hundred days off. But it's those moments that everything I'm doing in the program are for

209

00:44:48.180 --> 00:45:06.190

JedLevene: So the big wise was huge starting point next for me. What works for me is just prior to it, prioritizing, like, what are 3 big things I want to do this year. And if I did nothing else other than these 3 things, I will have had a good year in limitless.

210

00:45:06.280 --> 00:45:07.760

JedLevene: and for me.

211

00:45:08.250 --> 00:45:17.199

JedLevene: year one. It was just implementing surge meetings. defining who we serve and a service model for doing so

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00:45:17.230 --> 00:45:20.159

JedLevene: and starting to use one page plans.

213

00:45:20.470 --> 00:45:27.200

JedLevene: And again, I wanna share some practical tools in this. Hopefully, that's interesting or some value.

214



00:45:27.240 --> 00:45:43.070

JedLevene: But so I'll show you to like again. So often we think these have to be like these mega huge projects. But if you recall in my big, why is, you know, I see, insanely simple systems and processes. So

215

00:45:43.110 --> 00:46:08.360

JedLevene: I really try to. I think about it almost every day. That quote by Antoine de Saint X. Perry, the author of the Little Prince, you know perfection is achieved, not when there's nothing left to add, but rather when there's nothing left to take away. So I just wanna show you like, so define who we serve in our service model for doing so like this is all I do for my clients. We ran run a fairly large business.

216

00:46:08.370 --> 00:46:10.560

JedLevene: Licenses from Carl

217

00:46:10.820 --> 00:46:18.520

JedLevene: And then we we do an asset map for them. We update that twice a year at our meetings

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00:46:18.780 --> 00:46:20.659

JedLevene: we do a one-page plan.

219

00:46:21.610 --> 00:46:26.750

JedLevene: and we have this tool to show if the goals are on track. That's literally all I do.

220

00:46:27.010 --> 00:46:32.260

JedLevene: And you know, I personally manage about 125 million in assets

221

00:46:32.530 --> 00:46:42.040

JedLevene: and then I own some other business that other other advisors within the firm run. That's it. So you want to talk about insanely simple.

222

00:46:42.260 --> 00:46:46.600

JedLevene: Our clients are happy with that. It serves our market.

223

00:46:46.780 --> 00:46:51.189

JedLevene: and it is something that I can produce.

224

00:46:51.510 --> 00:47:04.629

JedLevene: In fairly short order. And I can update after each meeting in even shorter order. So again, even just saying, you know, I want to start using one page plans, and how we serve our clients.

225

00:47:04.670 --> 00:47:14.019

JedLevene: Well, again it ties that ties back in the big. Why, the the simplicity in doing so well, I love just you know. I say this all the time, and I think you really have to like

226



00:47:14.040 --> 00:47:23.720

Stephanie Bogan: there's, you know, intellectually knowing. And then there's like being knowing where you have this moment, where you've applied something here, and then you go. Oh.

227

00:47:24.120 --> 00:47:34.489

Stephanie Bogan: that's what they were talking about, right that Jed and I were, you know, shooting the breeze before the call, and really talking about how, looking at this every single week

228

00:47:34.740 --> 00:48:02.930

Stephanie Bogan: just lays that pathway in his brain like keep it simple work with the right clients right, like over and over your brain, literally reorient. So the natural path of least resistance is, it actually starts to move the needle and go. Yeah, we shouldn't do that. We're it has to start to reorient to the goals that you're now clearly setting. And again, goals, Michael and I talk about this a lot they don't have to be like, Hey, it's this dollar amount, or these days off

229

00:48:03.140 --> 00:48:17.350

Stephanie Bogan: aspirational goals. I call them outcomes, or the most motivating thing to your brain right to find who we serve in a service model for doing so, you know, efficiently and profitably, is like, Yeah, that's what I want. And it's something you can. Still.

230

00:48:17.350 --> 00:48:33.839

Stephanie Bogan: even though it's not specific, think smart goals, you can absolutely measure to it right like, Oh, is this really a great client? Do they fit our service model? No, but we'd make \$15,000 a year. But yeah, that they wouldn't fit anything. We do. You start to see that differently.

231

00:48:33.900 --> 00:48:44.819

Stephanie Bogan: What jet is doing constantly is consciously reinforcing to his brain the decisions that he's making in the habits he wants to build that are gonna create those new levels of success. Turns out it works

232

00:48:45.160 --> 00:49:09.120

JedLevene: totally. And I'll I wanna I'll talk about that a little bit. When we look at my my weeks, and exactly to your point. There's like, philosophically, this stuff's not hard to get, but the the subtlety isn't the nuance. Once you know what you want and why and how it's serving your bigger picture like you can go. You can go deep on your weekly schedule, and I'm gonna talk about that a bit.

233

00:49:09.250 --> 00:49:33.199

JedLevene: So just curious, just out of curiosity, too. But I don't know if you're curious or not. But this is, these are my big 3 priorities for for year 2. So like actively market to the right fit clients develop and implement high conviction, investment, philosophy and theme model and finalize how we're gonna like, Wow, our clients with service. And where where we're gonna add value.

234

00:49:33.360 --> 00:49:47.480

JedLevene: And so I say again, I'm gonna try to show some practical tools that I used in, limitless as we go through this so actively marketing to the right fit clients like that just started with no stress prospect process.



235

00:49:47.490 --> 00:50:08.940

JedLevene: And because I'm super creative at Rockwater, we call it the no stress prospect process. If any broke and you know, you can look at that on the website because it's one of the the limitless expressions you'll hear, I'm sure, fairly often is a rip off and deploy. So we stuck pretty close to the

236

00:50:09.250 --> 00:50:20.319

JedLevene: the the limitless well, almost exactly did the limitless framework for the no stress prospect process, because no sense of marketing. If you don't have a good way to bring those clients in.

237

00:50:20.410 --> 00:50:28.340

JedLevene: And so I think what's so important, too, is that you? You need to deliver on that process, too. Right? So we did.

238

00:50:28.540 --> 00:50:31.340

JedLevene: With our no stress prospect process.

239

00:50:31.710 --> 00:50:53.260

JedLevene: We follow it to a T every time, and then, you know, Adam will often speak about text or sorry a text expander that Adam us. We use something called text plays. I don't know if one's better than the other or not. This is just someone we happen to use. But you know my whole, no stress prospect process is in there. So it's so easy. Right? So if if we're having our 15 min initial call, I just type in

240

00:50:53.490 --> 00:50:58.069

JedLevene: backslash, no stress initial call. And I've got all my like

241

00:50:58.080 --> 00:51:10.880

JedLevene: point forms for my script that I'm going to use during that 15 min call someone reached out by the website and didn't book an initial 15 min call actually send this one out to just this morning. They get this email to book their initial call.

242

00:51:11.030 --> 00:51:18.710

JedLevene: follow up items, you know, items that we ask for their initial call. So everything's so easy, right? It's just backslash discovery meeting

243

00:51:18.740 --> 00:51:25.889

JedLevene: backslash. No stress and you know first step. So everything's there. So we we just

244

00:51:26.000 --> 00:51:33.650

JedLevene: you use the tool from the website for the framework. We've put it on our website. We've put it in print, and then I put it in text blaze

245

00:51:33.710 --> 00:51:34.940

JedLevene: to



246

00:51:35.070 --> 00:51:45.969

JedLevene: well, keep it consistent, and so make sure we're giving the client the experience that, hey? You saw this was our process. This is exactly what you're going through. Cause I think that's so important

247

00:51:46.050 --> 00:51:59.430

JedLevene: that they actually experience what you put out there developing a high conviction investment philosophy that was important for us. Our our funds were kind of a mishmash before we just said, Hey.

248

00:51:59.550 --> 00:52:02.329

JedLevene: we're going with passive, with some factor tilts.

249

00:52:02.550 --> 00:52:12.530

JedLevene: take it or leave it. And 100% clients were okay with it. But that simplified our practice, because now we have just 3 models.

250

00:52:12.590 --> 00:52:25.070

JedLevene: and if those one of those 3 models aren't to get fit for you, and it means we're just not a good fit for you like no hard feelings. You might think active management is the way to go. And hey, that's that's awesome.

251

00:52:25.140 --> 00:52:32.799

JedLevene: But us having conviction in our investment, philosophy again goes back to that big why of we are simplifying things.

252

00:52:33.070 --> 00:52:36.899

JedLevene: We run a really, you know, a fairly large portfolio.

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00:52:36.940 --> 00:52:40.100

JedLevene: and we have 2 funds in our portfolio.

254

00:52:40.190 --> 00:52:57.499

JedLevene: And the thing the thing I still love about that Jed is adam talked about this at the Kickoff. I think Adam and one of the calls right when we're so hardwired that when we we don't get the prospect it tends to feel bad. I want you all to just notice and reflect on how

255

00:52:57.500 --> 00:53:12.020

Stephanie Bogan: 0 reaction there was in Jed when he said, Yeah, like, some people just wanna more actual portfolio like no big deal. It's not for us like a hundred. Jed, I just think, makes me so happy about like a hundred percent acceptance.

256

00:53:12.150 --> 00:53:40.759

Stephanie Bogan: 0 resistance. What you didn't hear was no protecting, no proving, no hiding, no defending, like, you know, like it was just like whatever man. And that's as you get more, Con. That's



alignment of clarity when someone isn't a fit like genuinely your brain goes. Oh, yeah, we don't thank God we're not taking on that client versus. Oh, what if I lose that client. So I just I wanna I wanna note on that because, like Adam, that's not where Jed started. But it's just so cool to see

257

00:53:41.020 --> 00:53:47.169

Stephanie Bogan: just that consciousness and awareness and complete comfort with right building, your ideal practice

258

00:53:47.330 --> 00:54:02.119

JedLevene: absolutely. And Ill know you know this. But guess what happens when you speak to what you do and how you do with a lot of conviction. People don't push back because you have so much confidence. Really, Carl, Richard Richards always says you don't have an opinion

259

00:54:02.450 --> 00:54:21.489

JedLevene: like, Hey, Jed, what do you think about investments? Well, we could do this right now, and you know the tech sector could like. No, here's how we invest. Take it or leave it. And again, there's so much consistency in this. I if you look at my script for my, no stress prospect process. You can see that. Okay, I basically say something along the lines of like.

260

00:54:21.490 --> 00:54:43.839

JedLevene: and we don't. We? BA, we invest on evidence, not trends or fads or hot stock pickers. You're the type of person who's gonna be calling the office to ask about bitcoin or marijuana stocks or game stop. We're gonna drive each other crazy. And I can tell you right now, we're not gonna be a good fit, right? So like, put it out there, right? Cause it's you're you're saving each other time. But again it still ties back to the big why.

261

00:54:44.110 --> 00:54:54.370

JedLevene: And so just in the evolution. And how this develops. This is. These are my top 3. For this year. I still want to fine tune them a bit, but I'm just sitting with them for now.

262

00:54:54.460 --> 00:55:00.439

JedLevene: li wanna be an insane person when it comes to time blocking.

263

00:55:00.580 --> 00:55:10.439

JedLevene: It's like this is what the calendar says. For this hour the building. Better be on fire if there's if I'm not following this exactly.

264

00:55:10.660 --> 00:55:25.689

JedLevene: really getting big on those monthly client touch points, we want to refine those a little bit right size, my practice. So for all 3 of those things, I guess my point is like, if you only did those in any given year like you've had an awesome year. Right?

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00:55:25.990 --> 00:55:34.939

JedLevene: So just jumping ahead, I keep this in here just to remind me of the the framework that we're working within within limitless. You've all seen that



266

00:55:35.250 --> 00:55:39.700

JedLevene: I won't spend a ton of time on this. But

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00:55:39.790 --> 00:55:50.059

JedLevene: a again, it's just you gotta simplify. What you're solving for is, you know, your 3 year vision. You should be able to fit on a post it. If you want to burn that in your brain

268

00:55:50.080 --> 00:55:52.210

JedLevene: and remember what you're solving for.

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00:55:53.440 --> 00:56:02.549

JedLevene: And then again, it's good for me to read my mission and vision and values weekly. I read my limitless life booklet every Monday morning.

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00:56:02.710 --> 00:56:16.199

JedLevene: Cause it. You know it's it's almost cliché right? Company does a big retreat to form their mission and vision? Statement. They do a 3 day off site, work really hard on it, go home, stuff it in a drawer, and 6 months later not a single person there could tell you what it said

271

00:56:16.350 --> 00:56:28.179

JedLevene: right? And I'll actually use this to the the values piece to speak with my team at our meetings to, you know, I'll just talk about like, Hey. yeah, when you talk about a growth mindset and never ending improvement like.

272

00:56:28.230 --> 00:56:34.749

JedLevene: what are you doing in your role to demonstrate in that? Or how can we support you in being able to develop that this year?

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00:56:35.400 --> 00:56:37.880

JedLevene: and then

274

00:56:38.260 --> 00:56:45.149

JedLevene: super super important tool for me that I really apply is the the one page business plan.

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00:56:45.420 --> 00:56:55.029

JedLevene: So you know, you'll talk, Stephanie, I'm I'm sure, mentions often the you know we we underestimate what we can accomplish in 3 years.

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00:56:55.150 --> 00:57:03.429

JedLevene: and overestimate what we could accomplish in one. So my, my my framework that I use for the one year goals

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00:57:04.080 --> 00:57:12.040



JedLevene: is, and I think it may just be a good starting point if you're if you're wondering, is always have one goal related to revenue.

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00:57:12.410 --> 00:57:20.770

JedLevene: one goal related to client service. and one goal related to my time off. because at the end of the day

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00:57:20.790 --> 00:57:28.910

JedLevene: those are 3 pretty broad categories, and we're we're generally all solving for things. In those 3 areas you might have

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00:57:28.970 --> 00:57:38.820

JedLevene: different goals. But I think as a as a starting point. That's how I would think about it. you know. Revenue time off client service.

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00:57:39.070 --> 00:57:47.429

JedLevene: and you know it ironically. You know client service leads to more revenue, more time off. So it's a good thing.

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00:57:47.810 --> 00:58:03.269

JedLevene: And then a mistake I made with this, too, even though we were warned about it in the presentation, was trying to have like something for everything, every quarter. So keep it simple, because the you know, I was saying to Stephanie, for the call that, like the

283

00:58:03.530 --> 00:58:09.880

JedLevene: it's very anti-climatic, but like the best thing that had the biggest impact in my life in limitless

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00:58:09.980 --> 00:58:22.369

JedLevene: with just when I decided that under my out of office time and creating capacity that I wasn't gonna work any more weekends. I wasn't gonna dare set foot in the office

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00:58:22.470 --> 00:58:28.839

JedLevene: literally situation where my daughter there's an Amazon package delivered to the office on a Friday.

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00:58:29.110 --> 00:58:36.749

JedLevene: She really wanted it. My admin system let me know. Neil was here on Saturday. It's like, here are the keys. Here's the alarm code. You're going in the office to get it.

287

00:58:36.840 --> 00:58:39.220

JedLevene: because before I started limitless.

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00:58:39.520 --> 00:58:46.689

JedLevene: if you added back in all the Saturdays I worked the year prior, limitless, limitless. I had



negative 4 days off.

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00:58:47.250 --> 00:58:49.990

JedLevene: after just my first year of limitless.

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00:58:50.420 --> 00:58:55.440

JedLevene: I had 70 days out of office and revenue was up.

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00:58:55.660 --> 00:59:16.140

JedLevene: So sometimes these seemingly small things like big walk. You're not gonna set foot in the office on Saturday or Sunday. Well, huge impact on my life. And it's much better for. So I think, often we think, like, okay, every quarter. I'm gonna do the these 8 modules and revamp the website. And we're gonna launch a new marketing plan. It's like, just

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00:59:16.200 --> 00:59:23.760

JedLevene: take it easy and and really decide. you know, what am I solving for? And what's gonna what's gonna move the needle on that?

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00:59:23.820 --> 00:59:31.150

Stephanie Bogan: Well, what I love about that is, you notice, right? He's got the key objective. He's got the goals or outcomes. That's why we have that

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00:59:31.240 --> 00:59:44.640

Stephanie Bogan: middle layer there, right? We can go 70 days out of. But it's like how it's really the how layer. How are we gonna get this to happen? And then that bottom section or the actions that you can take? And again, like quick committees, is not

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00:59:44.730 --> 00:59:52.280

Stephanie Bogan: a 90 h project. I like the way that Jed, for the things that he was scheduling out right in, that it was. These are the things that I'm going to do

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00:59:52.440 --> 00:59:58.920

Stephanie Bogan: right. And then the how goes behind it. And that's the work that you spend right implementing your plan. So I think that's great, Chad.

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00:59:59.070 --> 00:59:59.780

JedLevene: Great

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01:00:00.700 --> 01:00:10.979

JedLevene: and then, just I've just moved mapping your business vision. I just moved that into a Google sheet just for my own convenience.

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01:00:11.160 --> 01:00:14.280

JedLevene: But if you if you look like



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01:00:14.480 --> 01:00:30.289

JedLevene: when I when I do my Quarterly Business Review, I I've kind of trimmed it down to matching the mapping your business vision, because for me those were the things that were truly important. I'll go on a bit more in a second. This, again, is just in here as a reminder to me.

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01:00:30.560 --> 01:00:32.849

JedLevene: And I think I think this is really cool.

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01:00:33.290 --> 01:00:38.369

JedLevene: Is that, just reminds me how few days we have to work. Right? So

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01:00:38.860 --> 01:00:57.380

JedLevene: you know, if you there's 365 days a year, obviously. You know, if you're factoring your weekends, we have 9 stat days here in Canada. And if you have 8 weeks out of office and 30 Fridays off, well, you are not working half the year.

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01:00:57.440 --> 01:01:07.439

JedLevene: right? So it's kind of cool to think, even just at the the 70 days out of office. When you add in weekends and Saturdays, it's like, Hey, 50% of the year.

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01:01:07.530 --> 01:01:08.880

JedLevene: I am

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01:01:08.970 --> 01:01:10.880

JedLevene: like, free.

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01:01:10.990 --> 01:01:17.160

JedLevene: pretty awesome when you think about it right? Cause you feel so much, you feel so much less tethered to it. I think.

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01:01:17.310 --> 01:01:22.950

JedLevene: yeah, absolutely. And it's it's just good reminder. When you are working. Make sure you're you're working to your

309

01:01:23.060 --> 01:01:40.089

JedLevene: morning routine, is. I just think so important. Just you know, there's there's lots of research, a lot of people know, but a lot more about it to me. But there's that that idea of bookending your day morning routine. Evening routine.

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01:01:40.220 --> 01:01:50.889

JedLevene: There, there's just so much research coming out on this. How systems are so much more important. There's just a there's just an article in the Wall Street Journal.



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01:01:50.950 --> 01:01:56.549

JedLevene: seeing that going to bed at the same time and waking up at the same time

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01:01:56.570 --> 01:02:07.880

JedLevene: they they're just proven that it's more important than how much sleep you actually get being able to set a rhythm for your body. It out outweighs that extra like extra hour of sleep.

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01:02:08.110 --> 01:02:13.100

JedLevene: So for me, whatever you can, you know, turn into a system, do.

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01:02:13.240 --> 01:02:20.430

JedLevene: And I wanted to mention earlier to that, Mike, my kind of epiphanies for limitless we're year one was

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01:02:20.560 --> 01:02:30.820

JedLevene: having a vision so much so important to every other goal. But year 2 my my big epiphany was. Systems are so important, and having a system

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01:02:30.830 --> 01:02:39.999

JedLevene: is exponentially more important than how good the system is like, I don't know. I bet you my! No stress prospect process.

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01:02:40.050 --> 01:02:41.390

JedLevene: I bet you there's

318

01:02:41.720 --> 01:02:59.199

JedLevene: tons of tons of processes out there that would break the floor with it. But guess what it works, and it works well, and I follow it the exact same way every single time. So I know if there is a hiccup in the process, or certain stages of moving well together. I know exactly where the problem is.

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01:02:59.250 --> 01:03:11.260

JedLevene: So that was my big epiphany. Here, too, is just turn everything that you can into a system, because that's the only way to evaluate it and going back to my big why, it keeps it simple, because you're doing it the same way every single time.

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01:03:11.610 --> 01:03:18.029

JedLevene: And your 3 epiphany, I'll to be deep. I'll let you know. I think it's gonna do something around time.

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01:03:18.380 --> 01:03:23.190

JedLevene: and I'm just gonna I'll just jump ahead, too. So

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01:03:23.620 --> 01:03:34.280



JedLevene: again, it's pretty obvious doing your annual calendar days off first. And then you you know, when you look at your weekends, your sat days and your holidays.

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01:03:34.350 --> 01:03:41.560

JedLevene: It gets pretty obvious that it's like, Hey, I've got to find some room to squeeze in here for these appointments. But

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01:03:41.650 --> 01:03:47.910

JedLevene: just finally here, just wrapping up, I was talking about the nuances of even on your weekly planner.

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01:03:47.980 --> 01:03:55.009

JedLevene: That's something that surprisingly for me is that I've I've gone like deeper and deeper

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01:03:55.270 --> 01:04:00.709

JedLevene: on how my week is structured, and you know how I want to be working when I'm here.

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01:04:00.770 --> 01:04:22.739

JedLevene: And again, you talk with the overwhelm, with that can happen in limitless like, there are entire coaching programs that are just based around this right? Like, I just read a great book called The 12 Week Year. And they, you know, they've got a coaching program. It's basically like your annual calendar, your ideal week and your quarterly planning. And that's that's your program.

328

01:04:22.950 --> 01:04:36.809

JedLevene: right? So you can get really in depth with this stuff. And I'm at the point where think I think Stephanie, you mentioned earlier, like, first time you go get through surge, you know. Just hey? That's gonna be the messy one.

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01:04:36.820 --> 01:04:45.629

JedLevene: you know. Debrief. What worked well, what didn't work? Well, what you keep doing? What do we need to change? But I found, and this is the like going from philosophical to nuance. Like

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01:04:45.830 --> 01:04:52.419

JedLevene: I. I'm really fine-tuning my week to where, like, I just love it like learning certain things about myself like

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01:04:52.480 --> 01:05:11.059

JedLevene: I do better. When I take a full hour for lunch. I used to eat at my desk, and I'd rather try to finish earlier and not take an hour for lunch. Guess what doesn't happen when I live 7 min from the office I go home, take the dogs for a walk. Maybe you know. Just read for 20 min.

332

01:05:11.370 --> 01:05:12.900

I'm killing it.

333



01:05:13.070 --> 01:05:28.829

JedLevene: So I found. And probably this will be a 2025 limitless thing that I like. I like my day where I'm gonna come in work for 3 and a half hours. Take a full hour. Lunch, come back, work hard for 3 h, and do that 4 days a week, and life is good.

334

01:05:28.900 --> 01:05:39.680

JedLevene: So that's why saying, like, you can go through the motions of setting up your week, and then you can really get involved to like? How am I at my best? How does this fit best for me? And it it does become

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01:05:39.810 --> 01:05:42.159

JedLevene: more more nuanced over time

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01:05:42.230 --> 01:05:59.160

JedLevene: and again not sure where to start it. It it's in the lessons like Monday is a good work on the business day, and I've stuck with the recommended framework. Like Monday. I work on the business, and I do my file prep. For the following week, not the current current week to give my mid time.

337

01:05:59.300 --> 01:06:11.000

JedLevene: Tuesday, Wednesday, Thursday, when you try to see clients and Fridays like, I call it, you know, plans and promises. So any financial plans that I need to update any promises made to clients. I've looked at those, and

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01:06:11.060 --> 01:06:12.750

JedLevene: once that's done like, just

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01:06:12.890 --> 01:06:19.100

JedLevene: go home, go, do something you enjoy and say so. Nothing profound on the on the other weeks as well.

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01:06:19.270 --> 01:06:28.129

JedLevene: So I'm probably over time. Alright. But no, you're right on time. Actually, we're gonna have time for questions, which is great. I'll stop share here.

341

01:06:28.170 --> 01:06:37.099

Stephanie Bogan: Great and I know we've got a few Rashani, Michelle. Jim, Jim, you, I think yours kicked in first. Why don't you? You wanted to ask about the worksheet?

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01:06:39.080 --> 01:06:41.650

Jim Nowak, CFP®, AIF®, AAMS®: Yeah. Yeah. Great stuff. I feel like

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01:06:41.660 --> 01:06:51.829

Jim Nowak, CFP®, AIF®, AAMS®: I'm on the same path right where you're at with all this stuff just not as good as you. But what is the worksheet with your kids that stood out to me at?



344

01:06:52.080 --> 01:06:54.449

JedLevene: Yeah. So I

345

01:06:54.650 --> 01:06:56.119

JedLevene: that was a covid thing.

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01:06:56.290 --> 01:06:58.220

JedLevene: So

347

01:06:58.470 --> 01:07:00.030

JedLevene: during Covid.

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01:07:00.150 --> 01:07:04.710

JedLevene: like many parents realize, probably didn't want to be home schoolers.

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01:07:04.830 --> 01:07:12.319

JedLevene: So my wife and I had a discussion like, Kate during Covid like this is getting crazy trying to do their school online. We're like.

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01:07:12.950 --> 01:07:13.690

JedLevene: what

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01:07:13.830 --> 01:07:22.360

JedLevene: what can we do to make sure they're okay. So we thought, okay, we're gonna we're gonna make them read for 20 min with us every day out loud

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01:07:22.660 --> 01:07:26.420

JedLevene: and make them write a paragraph every day, and they're gonna do a math worksheet

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01:07:26.540 --> 01:07:30.630

JedLevene: run back. So we just found some homeschooling course. It was called math.

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01:07:30.760 --> 01:07:34.900

JedLevene: you see. and you can order like the text. And we just

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01:07:35.310 --> 01:07:42.299

JedLevene: did a worksheet with them that you know 30 units per subject. And I think there's like 6 or 7

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01:07:42.390 --> 01:07:44.969

JedLevene: worksheets per unit. And

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01:07:45.040 --> 01:07:52.430

JedLevene: I just kept it up after after that cause we figure you know what? Let's keep up their reading, writing, and math. And

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01:07:52.460 --> 01:07:56.100

JedLevene: you know those other subjects will take care of themselves, and

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01:07:56.310 --> 01:08:04.369

JedLevene: so they're they're they both got 3D's and math so. and I know they didn't get it for me. So

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01:08:04.850 --> 01:08:06.949

Stephanie Bogan: Risha, you had a question.

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01:08:09.360 --> 01:08:20.190

Roshani Pandey: Yes, Hi, Jed, thank you for sharing your limitless journey. I was curious. What is the monthly check in with clients. Is it just a phone call? Or do you send something?

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01:08:20.770 --> 01:08:34.350

JedLevene: Yeah. So so we don't do a check in every month not like a phone call check in. But we try to have a touch point every month. So, for example, you know, 2 of the months of the year. That's their review meeting

363

01:08:34.510 --> 01:08:43.410

JedLevene: the following month is them getting a copy of their their asset map one page plan, and am I on track piece?

364

01:08:43.609 --> 01:08:50.830

JedLevene: We also do a a fun thing once a year we send them a copy of their investment policy statement with

365

01:08:50.859 --> 01:09:07.820

JedLevene: Rockwater branded Starbucks gift card with the Starbucks will customize it all for you. So we say, we know reading your investment policy statements about as fun as a root canal. So here's coffee on us while you read it once a year. So just a nice way to, you know. Touch on their risk, tolerance and investment policy statement once a year

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01:09:07.899 --> 01:09:14.259

JedLevene: Beneficiary Review. So it's it's stuff like that all highly scalable.

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01:09:15.080 --> 01:09:18.820

JedLevene: And it's it's just keeping us in front of them.

368

01:09:19.120 --> 01:09:20.380

Roshani Pandey: Yeah, that's great.



369

01:09:21.670 --> 01:09:29.029

Stephanie Bogan: Michelle, you had a question, and if anyone else has one feel free to just jump in. Got a few minutes to pick Jed's brain.

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01:09:30.510 --> 01:09:36.109

Michelle Glass: I just wanted him to. Explain his plans and promises.

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01:09:37.410 --> 01:09:40.779

JedLevene: Yeah, so that that's just a term I use for myself. So

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01:09:40.800 --> 01:09:54.869

JedLevene: if I if I promise the client like, Hey, I'll look into that and get back to you by Friday. Great! Or if it's the plans part is just Updating their asset. Map one page plan. And am I on track piece

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01:09:54.950 --> 01:10:02.340

JedLevene: that we do after the meeting? And then, just basically anything that I said I would do for clients. I carve out time for that. So

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01:10:02.380 --> 01:10:11.109

JedLevene: especially during surge your follow up to search can be what puts you off the rail and distracts you from other things. So

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01:10:11.180 --> 01:10:19.149

JedLevene: for me, it's just about setting the expectation point, saying, like, Yay, I'd be happy to send you that article I was talking about on such and such.

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01:10:19.160 --> 01:10:26.890

JedLevene: You'll have it by Friday afternoon. So it's is this that type of stuff. It's it's more clean up of my

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01:10:26.940 --> 01:10:30.039

JedLevene: client-facing to-do's and updating their plans.

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01:10:30.710 --> 01:10:31.460

Stephanie Bogan: Right?

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01:10:31.780 --> 01:10:32.900

Michelle Glass: Thank you.

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01:10:34.040 --> 01:10:36.979

Stephanie Bogan: Good question, Michelle. Any other questions for Jed.

381



01:10:39.210 --> 01:10:54.270

Stephanie Bogan: Anyone? I don't know. If you get your I don't. I always try to figure out there's my reactions who got some good ideas from that around just how to kind of codify and apply some of the list limitless concepts in a way that you can revisit and reinforce in a way that will be helpful to you.

382

01:10:55.700 --> 01:10:56.430

Cool.

383

01:10:56.750 --> 01:11:26.310

Stephanie Bogan: awesome. Yeah, no, it is the first time I saw it, I thought, that's really really cool, because he's just taken the pieces and put them together in a way that he can review and reinforce over and over and over again. It's hard to make exceptions when you're looking at what you're doing and why you're doing it week after week after week. And, Jed, I just think it's great. Just you'll notice if you read when we talk about objectives and outcomes for the year or the quarters. That's what we mean, right? Like, it's not like check, less inbox client service model.

384

01:11:26.310 --> 01:11:49.869

Stephanie Bogan: Why, jets doing that is wrapped into his goals right? Build an efficient service model right? Like you feel like, build a wow client experience. And then all the steps are what's behind that. So as you reflect on your year and your priorities like you start to see a couple of big priorities are gonna really move the needle. And there's some implementation work to do. And as you get those really anchored

385

01:11:49.870 --> 01:12:06.640

Stephanie Bogan: every call. You're gonna pick up something right every inbox. You're gonna pick up something. But those are just the cool things that you pick up as you go. The core is. And I think Jed's book does a really good job of just codifying. Here are the 3 priorities for the year. And here are the decisions and systems I'm using

386

01:12:06.970 --> 01:12:18.520

Stephanie Bogan: to align with those priorities. The time system aligns with the priorities right? Like the service model aligns with the priorities. That's the congruence where things really start to work.

387

01:12:18.860 --> 01:12:32.230

Stephanie Bogan: So, Jed, thank you very much for that. Allison's also, I know you guys are eager to get the trail map and the Summit action plan. So Allison, just drop the summit. Accent, action action plan in the chat. If you want to head, start on that, and then we'll post the trail map

388

01:12:32.270 --> 01:12:49.560

Stephanie Bogan: for each lesson and the action, the sample action plan in each of the mindset vision and time lessons, so it's there for you. It will be in the next inbox insight and Allison, and we'll obviously put it on tribe, so you'll have both the the path and the Example action plan, and that

389

01:12:49.590 --> 01:12:57.759

Stephanie Bogan: genuinely tells you what you need to do this quarter beyond clarify. So what Jed really did was to clarify vision



390

01:12:57.760 --> 01:13:21.349

Stephanie Bogan: right, and put his vision into a book. That's how he personally connected the dots between his vision, his habits, and his accountability, which is why I know it seems like oh, it's a cool book, but the reason that I so much love it is because he's taking 3 of those objectives and integrating them into one place where he's just constantly reinforcing what he wants to do and why it matters to him.

391

01:13:21.450 --> 01:13:33.699

Stephanie Bogan: And you see him just getting really calm and consistent. and how he shows up, I'll attack this priority, and then you get a confidence where you don't go. Oh, my God! Do I think I'm gonna do that. You go. This is what I'm gonna set out to do this year.

392

01:13:33.810 --> 01:13:38.600

Stephanie Bogan: And then, even if you don't have the middle in the end. Right, Ian or misty. You'll be like

393

01:13:38.720 --> 01:13:50.990

Stephanie Bogan: Adam, and I don't have the middle or end. Michael doesn't have the middle or end. We just have historical evidence that says, knowing the beginning and the outcome will figure out the middle, and our brains don't freak out as much.

394

01:13:51.540 --> 01:14:04.610

Stephanie Bogan: And just so, you know, when we do new stuff? Our brains asked the same question. Right? I was on Phone Michael, and I'm like, I don't know anything. It'll work. And he's like, I don't know, like I don't have a hundred percent certain day that the idea is gonna execute the way it is in my head.

395

01:14:05.320 --> 01:14:15.710

Stephanie Bogan: But that's the point of what we do like. There is something about you that said, I'm going to go start a practice, and I don't have to have everything mapped out for me, and when I did I didn't agree or like it.

396

01:14:15.880 --> 01:14:28.439

Stephanie Bogan: But we also don't like that having it mapped out. So let's pick up from there. I want you guys to really think about that concept and how you can apply it. And again, it doesn't necessarily have to be

397

01:14:28.690 --> 01:14:36.160

Stephanie Bogan: the limitless life book it has to be. What's your way? Hold on! I gotta play this again, and I've got all these little boxes on my screen and slide show

398

01:14:36.640 --> 01:14:40.420

Stephanie Bogan: you alright. That should work. It's

399

01:14:40.630 --> 01:14:53.500

Stephanie Bogan: how can you connect those dots? You can follow right? The templates and the



samples no issue. Jed got a little creative and said, Here's how I want to apply it, Jed. We got creative cause. You know, we love branding around here. We put your book in an actual book

400

01:14:53.770 --> 01:14:56.659

Stephanie Bogan: so we're just gonna scroll through those slides here.

401

01:14:57.000 --> 01:15:00.209

Stephanie Bogan: I thought it was kind of cute that we actually put in book book.

402

01:15:00.870 --> 01:15:22.269

Stephanie Bogan: but you can start to see like, if you look at that every week. It's reinforcing those foundations for success. That's why we call them base camp goals get clear, get focused, get to work. They're all baked into that mindset. But in particular the vision and time lessons. Because we know if you apply those strategies, they have a high likelihood of working. It just tends to be what happens.

403

01:15:22.330 --> 01:15:25.789

Stephanie Bogan: So here is as we talked about your goals for the quarter.

404

01:15:26.070 --> 01:15:40.079

Stephanie Bogan: Adam feel free to jump in here, too, because I know you right. Have you do this still every year? And the cool thing is, Adam, like Jed. He doesn't over complicate it right when you think when he thinks about his vision, and why, Adam, do you want to just share a little bit about how you're going

405

01:15:40.280 --> 01:15:44.040

Stephanie Bogan: through that process when you started, and how you're going through it. Now

406

01:15:44.060 --> 01:15:50.950

Adam Cmejla, CFP®: I've democratized this a little bit more as the team has grown, and I think this goes back to the vision where it's even back. Then it was

407

01:15:51.110 --> 01:16:10.970

Adam Cmejla, CFP®: quote unquote, just Kathy and I. And the team has evolved to that point where now I go into the beginning of the year with my own personal goals. But I'll also reconcile them against the goals of the team as well. So we'll use a version of this and start putting into place the things that we're gonna be working on each quarter which Jed brought up the the the the

408

01:16:11.590 --> 01:16:21.669

Adam Cmejla, CFP®: the quarterly year. I can't remember that book. I started reading it, and then, honestly, I didn't finish it. I think I only got maybe a third of the way through it before is like I have heard this story before

409

01:16:22.000 --> 01:16:40.530

Adam Cmejla, CFP®: 12 week year. There we go there we go. We just we break down our quarterly, or we break down the annual goals into our quarterly rocks to take a page out of Gino Wickman in Theos



playbook, and we track them on Asano. It's a board. It's Adams Rocks, John's rocks, Kathy's rocks. Kate's rocks

410

01:16:40.880 --> 01:16:48.820

Adam Cmejla, CFP®: it it's loud the rinse. Repeat it it. I think the biggest challenge that advisers have in this process is

411

01:16:49.420 --> 01:17:17.140

Adam Cmejla, CFP®: gobsh! We overthink it. It doesn't have to be that complicated. It really doesn't. We just figure out what's the next? Doesn't have to be the best. It's just what's the next. And I think sometimes we mix those up. It's like, well, the the first thing that has to be worked on the first thing that I have to work on has to be the absolute best thing, and we sometimes get into that paralysis by analysis of which one's the best one that I should work on first. It's like, don't don't do that.

412

01:17:17.220 --> 01:17:26.600

Adam Cmejla, CFP®: Just work on the next thing next. And there are some things where there's an order right? Like you don't wanna website before you get clear on your client profile.

413

01:17:26.670 --> 01:17:45.389

Stephanie Bogan: But to Adam's point, outside of things like that which should, I think right, are fairly obvious to most of us, is the next best step is taking one, because right now what you're doing more than anything is breaking the pattern of the status quo. Adam and I and the team are working against every year that you've been alive in the way that you do things.

414

01:17:45.910 --> 01:17:59.239

Stephanie Bogan: That's that's the resistance that we're facing. Okay, how do we articulate the information, how do we communicate it? Let's put it like as the team ask Adam, like, all I do is sit around going. How do I make it simpler. How do I make it easier? How can we connect more of the dots

415

01:17:59.520 --> 01:18:03.710

Stephanie Bogan: because we know the actual work? Once you start

416

01:18:03.770 --> 01:18:19.420

Stephanie Bogan: the connect, the dots is more than enough. Once you start on searches, there's more than enough there to get you started, and to know what questions you have or gaps to fill. It's pretty easy here to get specific like, how should I do this or this, like we do that all day long on tribe and in calls.

417

01:18:19.420 --> 01:18:33.620

Stephanie Bogan: It's the getting started part. So if you have not picked something anything, I don't care what you pick. The wrong thing to do is to not do something. Our brain goes. What about this? What about this? What about this? And we do nothing.

418

01:18:33.620 --> 01:18:52.640

Stephanie Bogan: The most right thing to do is pick something to do, because that momentum and that energy and the moving forward will get you to the next thing, Rashani, where you're like. Oh, well, I



could have probably done that later, but I got that out of the way, and now I like the clarity comes from taking action. The clarity does not come from staring at the paper, wondering what to do.

419

01:18:52.930 --> 01:19:00.159

Stephanie Bogan: and if you really get stuck, as you know, right, raise your hand and ask for help. So here are the questions that we want to invite you to ask yourself right now.

420

01:19:01.100 --> 01:19:02.390

Stephanie Bogan: Deep Breath.

421

01:19:03.600 --> 01:19:06.900

Stephanie Bogan: we're talking about implementing change. We're one month in.

422

01:19:08.010 --> 01:19:16.039

Stephanie Bogan: Some of you have hit the go button, and you're already raring. Some of you are, just, you know, sitting here wondering how to get it right.

423

01:19:17.320 --> 01:19:29.250

Stephanie Bogan: And as a result, right? That's how we get it wrong by not so. Do you have a clear and compelling vision? Jed shared a great example. If it doesn't have to be, I wanna build this kind of firm with this many people and this many dollars.

424

01:19:29.570 --> 01:19:35.329

Stephanie Bogan: It just has to be a compelling vision to you. Right? Your big. Why is the start of that

425

01:19:36.260 --> 01:19:49.180

Stephanie Bogan: model. Practice is the single most effective exercise for getting to that vision like, how big do I want to be? How many clients do I want, like Jed's model? Is this much revenue, this many clients, this much time.

426

01:19:49.700 --> 01:20:04.009

Stephanie Bogan: that tells me everything else I need to know in order to make this much money with this many clients. I have to charge this much in order to charge this much, I have to deliver this kind of value. Okay, who's the client I'm delivering that value to? Does that work? Yes, okay. If yes, go market. Everything towards that client.

427

01:20:05.030 --> 01:20:12.220

Stephanie Bogan: like. In one sense, it's really simple, but our brains get all clogged up. And I remember Adam like, there's a

428

01:20:12.410 --> 01:20:17.860

Stephanie Bogan: I think you did. You shared your journal post recently on try, which is great, we should put that in in Box Allison.

429



01:20:18.000 --> 01:20:26.030

Stephanie Bogan: You know, 9 or 10 months of like what and how, and what and how, and when he finally just did something, it was like off to the races.

430

01:20:26.360 --> 01:20:33.609

Stephanie Bogan: So if you're feeling that initial resistance and they I don't know, just understand. Like I could map everything out for you.

431

01:20:33.670 --> 01:20:47.899

Stephanie Bogan: You still have to take that first step so hopefully, this gives you a starting point like you're gonna go into the vision lesson. You're gonna download model practice. You're gonna rate. And here's what I want you to really see about this. I'll show you in just a moment is

432

01:20:47.930 --> 01:20:53.900

Stephanie Bogan: to Jed's point. You don't have to worry about the bottom half of the sheet. Your is already defined for you. You're working on vision and time

433

01:20:54.050 --> 01:21:06.289

Stephanie Bogan: mindset's ongoing awareness at this point. Right now, your job is to have a vision right? The culmination of that is your one page plan or your model practice, if that's the level of clarity you've got.

434

01:21:06.440 --> 01:21:13.429

Stephanie Bogan: and then to start taking agency over your time. And that's where the other 2 pieces come in? Do we have happy, high performing habits.

435

01:21:13.970 --> 01:21:35.589

Stephanie Bogan: our our thinking defines our feelings right ultimately, what we do over and over again forms our thought, habits, and our behavior habits? Are we checking email 17 times a day? Are we actively doing \$50 an hour work, even though we have people who could do it for us. Right? Are we checking in with ourselves in the morning? The research all says how you start your day sets your day

436

01:21:36.380 --> 01:21:56.599

Stephanie Bogan: right. Are you actually taking some step to do things, to put yourself in a happier, higher performing zone? Not all the way to me. Like to jets point around calendar. My first calendaring was like big blocks, days now every minute, literally of my day, and it just may not have flexibility, but, like every minute of my day is blocked.

437

01:21:56.900 --> 01:22:06.350

Stephanie Bogan: I'm I'm hiring a new Ea right now. So I was looking at my calendar with a client the other day to schedule something, and he was like, Wow, that's a lot on your calendar. And I said, Watch this, and I clicked the button.

438

01:22:06.650 --> 01:22:30.620

Stephanie Bogan: Right? Cause I have multiple calendars. My model calendar, my calendar stuff that comes in from Asana Eas, and I just clicked it, and like all the stuff around the beginning and the end



went away, because that's not stuff I should be doing because I normally have an Ea. And he was like, Oh, I was like, Yeah, that's my normal schedule. But I'm down in Ea. So when you get really dependent on somebody, and they're not here, all that work comes back right. Would you get a system for that. So

439

01:22:30.660 --> 01:22:43.849

Stephanie Bogan: hopefully, this action plan helps you. And then the big ticket item on the back end is, what are your accountability systems? How are you making sure Jed built an accountability system. That's what he actually built.

440

01:22:43.980 --> 01:22:57.039

Stephanie Bogan: He built a system that said, I'm going to look at the stuff that I said mattered every week to remind myself that it mattered. So I can make decisions that align with what I say mattered. I'm going to make sure the tongue in my mouth, and the tongue in my shoes are actually moving in the same direction.

441

01:22:57.480 --> 01:23:09.390

Stephanie Bogan: So here I broke it down for you further. and I even got some cool AI graphics to make a custom sign which I was pretty stoked about last week. That was my

442

01:23:09.410 --> 01:23:19.110

Stephanie Bogan: As I'm geeking off an email. It was free time. So I was allowed to do it. I was just like, Oh, what's this? AI button do? And you have to work with it quite a little bit. Trust me. But

443

01:23:19.120 --> 01:23:35.159

Stephanie Bogan: your goals for this quarter, as we talked about right? Clarify that vision. And then strategies elevate your email. Success shifter for accountability, daily practice for habits and accountability. So under clarify vision, right? Your outcomes

444

01:23:35.390 --> 01:23:47.529

Stephanie Bogan: right? Should be a big YA business vision, right or model practice like those are just exercises to get you to your version of the one page plan Jed just uses the 3 year vision fine.

445

01:23:47.590 --> 01:23:59.889

Stephanie Bogan: He still translates it into that one page plan. And then, in your case, right, Jed added the limitless life Book, to really review that vision and reinforce it over time, creating positive personal habits.

446

01:24:00.020 --> 01:24:10.259

Stephanie Bogan: Do you have a daily practice, you know, morning meditation or journaling, or what Adam journals right? Especially when he's facing challenges. It's he'll tell you like it's his go to. He has

447

01:24:10.300 --> 01:24:24.579

Stephanie Bogan: positive personal habits. I had an industry leader, a name that you would all recognize reach out to me last week, and I spent an hour and a half on the phone with this person because they were going through a major business issue crisis like legit crisis, like the kind of thing that would curl your toes.



448

01:24:26.030 --> 01:24:32.380

Stephanie Bogan: And I said to this person, I'm so glad that you reached out. What is, what is it hardest for successful people to do?

449

01:24:34.060 --> 01:24:35.109

Adam Cmejla, CFP®: Ask for help?

450

01:24:35.240 --> 01:24:44.500

Stephanie Bogan: Yeah, it's really hard for everyone. Genuinely, it doesn't get easier unless that's the habit. Remember that quiz we took in the beginning. What was the moral of the quiz?

451

01:24:46.860 --> 01:25:02.510

Stephanie Bogan: Ask for help? I have all the answers, and no one asked for help. Right? I was like, look you did the hardest thing you reached out to as someone in your support system. All the research shows that 2 things right. Coaching and community help us with crisis and change.

452

01:25:03.400 --> 01:25:14.590

Stephanie Bogan: limitless as a support system. Some of you have reached out some of you. I'm going to encourage to do that right. But look at those personal habits. You're not gonna get to my level, or Adams, or even Jed's out of the gate.

453

01:25:15.490 --> 01:25:17.460

Stephanie Bogan: Notice how they talk about their year. One.

454

01:25:17.710 --> 01:25:40.049

Stephanie Bogan: I started here. It's kind of like going to college, right? Bachelor's master's. Ph. D. We're gonna give you that bachelor's 10, you're gonna see the view of everything Bridget's gonna decide, hey? You know what? I really gotta double down on the vision. And that's we're gonna put a lot of my energy. And here's one habit and the accountability system like you don't have to go all in on everything to Jed's point

455

01:25:40.270 --> 01:25:52.679

Stephanie Bogan: building accountability. We'll talk more next month around the Kpi worksheet. So we're staging it out but your success shifter. If you haven't gone into that. That's a fabulous personal accountability system.

456

01:25:52.680 --> 01:26:11.720

Stephanie Bogan: because that's the piece that says every day did Jed do what he said he was gonna do to be more successful to Jed, not do the things that we're gonna hold him back, and you have to look yourself in the face every day and ask that question which tends to shift your Baba behavior in the direction that you want it. So if you're looking like, print this out, that's your cheat sheet for the quarter

457

01:26:12.590 --> 01:26:23.180

Stephanie Bogan: like, if you do these things you will have a lot more clarity. You'll have a lot more focus,



and you'll have a working system to keep you on track, and that will help you figure out what to do next

458

01:26:23.410 --> 01:26:37.859

Stephanie Bogan: without the clarity. You're just gonna be picking things which Adam will tell you still works great like it really does cause everything we're giving you is something that you need ultimately to implement in your practice. Right? It's just the order in which you want to implement them.

459

01:26:38.390 --> 01:26:47.569

Stephanie Bogan: So here's an example, Adam, I think, Adams, one page plan is still a notepad page, and that's totally okay. It's whatever works for you.

460

01:26:47.770 --> 01:26:49.790

Stephanie Bogan: Literally.

461

01:26:49.800 --> 01:27:09.200

Adam Cmejla, CFP®: I have like, I'm an analog guy. Everything that I've done in limitless literally fits inside this manual folder. And if I really be honest, I take up my totally score because I have that I have my wind folder, if you remember that stuff from our our notes that we did. And then, yeah, everything else is literally boiled down to an analog.

462

01:27:09.740 --> 01:27:20.060

Adam Cmejla, CFP®: Yeah, if I go back to Adam, has a folder, I have a folder with, Yeah, the 28, 2,018 business revenue model.

463

01:27:20.860 --> 01:27:50.620

Adam Cmejla, CFP®: Yeah, these numbers have changed just a little bit since that time period. But it's really fun to look back right when you now you're like, Oh, my gosh, I remember when we first started one of the coaches talked about like he would just walk up to the slot machine right? I just got so good at it that I could just pull the slot machine, and that's really where Adam is now. He just knows if he shows up and pulls, he wants to double, he can. He's just gonna go in and right figure out how to pull the lever on the slot machine, and it's gonna you know, it might not be easy all the way, but it'll work.

464

01:27:50.940 --> 01:28:03.030

Stephanie Bogan: So the thing I want you to really pay attention to in February is your one page plan. If you want to keep it more strategic with model practice or business vision. Totally okay. But we need that beacon

465

01:28:03.180 --> 01:28:17.119

Stephanie Bogan: right to guide and pull us forward. Because that's our vision accountability. Right? We can spend a lot of activity and energy doing a lot. But we don't know if it's aligned with the outcome we want to create until we define the outcome we want to create. And again. If getting really specific is challenging, don't.

466

01:28:17.360 --> 01:28:28.929

Stephanie Bogan: it will get better and easier. You'll get clearer and clearer. It's what's that spot on the horizon that you can get clear on. So this top half is really the most important right? Your big ticket goal.



467

01:28:29.170 --> 01:28:46.650

Stephanie Bogan: the the goals and outcomes right like Jen, I wanna take 60 days off. I wanna simplify, I wanna grow revenue. And then your objectives for the year become, hey? I'm gonna maximize my time. focus on it that right? And then each quarter you go. What am I going to do to move in that direction? Some of them, like Jet, will just be decisions. Quit the committee.

468

01:28:46.730 --> 01:28:53.210

Stephanie Bogan: Others will be right. Build out the service model, put it into the tech. That one will take a little bit more. Don't judge them.

469

01:28:53.370 --> 01:28:59.819

Stephanie Bogan: It's just what are those actions? So again, for you're set. These are your actions

470

01:29:00.550 --> 01:29:04.000

Stephanie Bogan: right. And there again, they're all in each of the lessons.

471

01:29:04.170 --> 01:29:19.250

Stephanie Bogan: Hopefully, this gives you that 80,000 foot view of why we're doing each of them, and how they go together. This are these are your base camps, because these are the foundations that any human needs to work most effectively, productively, and enjoyably.

472

01:29:19.350 --> 01:29:29.879

Stephanie Bogan: All the science and research says it. And you've yet to meet a person that says, you know, I don't have a vision. I have bad habits, and I'm horrible at accountability, and I'm loving my business in life right? We? That doesn't happen.

473

01:29:30.190 --> 01:29:38.839

Stephanie Bogan: The question is how we get ourselves there. So if you're struggling with the details, don't worry about it. Everybody here can fill out this top section.

474

01:29:40.100 --> 01:29:48.850

Stephanie Bogan: Especially Jed did a great example right? Those priorities, those that's what's in these boxes is just those big priorities.

475

01:29:49.930 --> 01:29:58.840

Stephanie Bogan: So don't let your brain turn it into a big, scary monster when you were a kid, and you always thought there was a big scary monster in the closet. Did you not know there really wasn't

476

01:29:59.020 --> 01:30:12.990

Stephanie Bogan: like. You knew there wasn't really a monster in the closet. but you were emotionally attached to that fear. Your parents could come in and open the closet door. Adam and I, Jed, as an alumni can come in, open the closet door and be like, see no monsters. Not that big a deal.

477



01:30:13.260 --> 01:30:15.609

Stephanie Bogan: You're still in the big scary Munster phase.

478

01:30:16.200 --> 01:30:28.419

Stephanie Bogan: Breathe through it. Take those next steps. So we want you to get clear on your vision, and we're breaking this out. So we'll do worksheeting and other stuff next month. So if you're not there, don't worry about it this month. It's vision

479

01:30:28.440 --> 01:30:29.989

Stephanie Bogan: and elevate your email.

480

01:30:30.310 --> 01:30:43.510

Stephanie Bogan: You're not all. You don't all have an assistant to delegate it to. That's okay. It's what? Where can you? That's why I called it. Elevate your email. Can you go to 3 times a day from 17?

481

01:30:43.600 --> 01:30:57.440

Stephanie Bogan: Because let's be honest. Anything that needs to be known in less than a 3 and a half or 4 h block probably means somebody died and you'd get a phone call anyway. right? Like, what's really the difference between 17 and 3? Can you get down to 2.

482

01:30:57.670 --> 01:31:11.039

Stephanie Bogan: Can you have someone on your team start to check it? Can you hire someone 10 HA week just to check that? Can you do what Adam did and do the centralized inbox so that someone else is processing half of the stuff that you don't need to see.

483

01:31:11.510 --> 01:31:21.410

Stephanie Bogan: Can you put same box in place. Can you limit like, can you pick one? I'm not even gonna say, Can, that is your coach assignment this month

484

01:31:21.490 --> 01:31:33.609

Stephanie Bogan: to draft that one page plan and pick something that elevates your email. You don't have to feel like you have to do it all like Adam, or I cause that'll stop you. What you do need to do is pick one

485

01:31:33.680 --> 01:31:36.540

Stephanie Bogan: action in the direction of elevating your inbox.

486

01:31:39.330 --> 01:31:42.770

Stephanie Bogan: Adam. That probably was a game changer for you right getting out of email.

487

01:31:44.030 --> 01:31:53.009

Adam Cmejla, CFP®: Yeah, it's still work in progress. Or let me reference as you start inserting more variables into the equation.

488



01:31:53.120 --> 01:32:10.380

Adam Cmejla, CFP®: the demands and the requests it. It it you're constantly evolving. You're constantly training your Ea. And when you change Ea is that kind of derail the process a little bit. But yes, when you get to that point of even just systematizing and organizing the inbox. If you're the one doing that

489

01:32:10.400 --> 01:32:19.130

Adam Cmejla, CFP®: implementing what worked well for me was taking the getting things done bottle, which is again in my folder. Here I have a snip, or I have the cut out of it

490

01:32:19.580 --> 01:32:35.769

Adam Cmejla, CFP®: that you can see right there. It's the just Google David Allen getting things done. And that's the workflow. So if you build that into your email inbox, just so that you have a place to drag things, implement that in same box. Begin there, and you'll be, I mean, if you're anything like me, you'll be like, oh, wow!

491

01:32:35.810 --> 01:32:42.829

Adam Cmejla, CFP®: I feel like I have control over the inbox now, instead of just reacting all the time to things coming in. When you have a system in place

492

01:32:42.890 --> 01:33:02.160

Adam Cmejla, CFP®: that makes man. You have to. You have to have a system to manage something. If there is no system difficult to get a handle on it level. One email is getting a handle on the inbox processing system to Adam's point. Right? You're getting better at it. You're using same box. You have an assistant, check it, etc.

493

01:33:02.160 --> 01:33:19.889

Stephanie Bogan: Level 2. For all of you don't feel like you have to jump. There is getting really clear about what actually shows up in your inbox to Adam's point. Right? We have a centralized inbox for coaching. I still have a private inbox, right? If Adam needs to email me, or like marked Virgin or Michael like.

494

01:33:19.980 --> 01:33:42.209

Stephanie Bogan: So it's really about making sure that you're only spending time on the things that are really warranted. And the problem with an inbox is, you have no control over what's in it, which means you have no control over whether you're spending your time on the right things, which means getting out of the inbox and getting a filter right? So, however, you get to hear the things that Bridget needs to look at today.

495

01:33:42.850 --> 01:33:53.979

Stephanie Bogan: whether it's an assistant or same box. Right? You're just elevating until more and more you just get to a point where it's like, I've got clients who don't even do. Email. They just tell their assistant how to reply, and off it goes.

496

01:33:55.650 --> 01:34:05.700

Stephanie Bogan: I've got one guy he's like, I just, I. All my kids need to know that I don't have like. I want my kids to believe I don't have a phone like I want them to genuinely believe that I'd like they're not gonna see it when I'm with them.



497

01:34:05.750 --> 01:34:18.579

Stephanie Bogan: like like goes in a basket. And he walks away. And and and I'm like, Okay, your wife must have phone and text, because there's always like kids stuff and class stuff and pick up stuff. I was like somebody's stuff on text.

498

01:34:18.840 --> 01:34:36.159

Stephanie Bogan: But the idea is to really think about how you can create those new levels of success. When Adam started he pulled out a yellow pad and he wrote down what he thought is vision wise. I need this much more revenue. Right? Boom! Boom! Boom! But he didn't worry about how he was going to do it. He just got clear on what he wanted to create for himself and his family.

499

01:34:36.620 --> 01:34:53.639

Stephanie Bogan: So these should sound pretty familiar to you at this point. 10 steps to create new levels of success. This isn't Stephanie. And Adam thought it was a fun idea. There's actually a massive amount of research and studies around each of these, which is how they made the top 10 list, one. Self reflection.

500

01:34:54.150 --> 01:34:59.610

Stephanie Bogan: What am I doing? Is it really working for me? Is it feeling good? Am I getting in my own way.

501

01:34:59.820 --> 01:35:00.540

Stephanie Bogan: Okay.

502

01:35:00.640 --> 01:35:21.240

Stephanie Bogan: clear goals. You just spend a bit of time talking about that. It's a lot easier for your brain to get on board with helping you get to goals when it just has, like a general idea of what you actually want to accomplish. You can say Chicago great if you can say. You know, Baron's pizza on Forty-seventh Street in Chicago, also awesome. But Chicago works

503

01:35:21.790 --> 01:35:33.029

Stephanie Bogan: right to Jed's like, I want a simple, efficient practice that elevates my life like you can still use that as a benchmark. Is this simple is efficient, is it elevating my life? No, it's \$50 an hour work. I should probably not be doing it.

504

01:35:33.570 --> 01:35:34.919

Stephanie Bogan: Create a plan.

505

01:35:34.990 --> 01:35:44.640

Stephanie Bogan: Adams plan was on a yellow pad. We've turned that into a nicely branded one page plan, if you like organization and structured. It doesn't matter.

506

01:35:45.060 --> 01:35:53.049

Stephanie Bogan: It doesn't matter. It matters that you get it out of your head. You write it down and you



set it, because that's what moves your brain into action.

507

01:35:53.120 --> 01:36:06.900

Adam Cmejla, CFP®: Replace bad habits. Oh, go ahead! I think the other thing that and I'm I'm just finishing up a thought here, and chat as well about where where to begin, and which form which, you know, there's there's so many different tools and templates that we have in the library.

508

01:36:06.930 --> 01:36:22.529

Adam Cmejla, CFP®: and what I would encourage, and this again, I don't want this to sound redundant, and being the same as what I said earlier. Maybe this rhymes don't underestimate the amount of clarity that you will get on what your next step is going to be by just taking action on something.

509

01:36:22.550 --> 01:36:38.809

Adam Cmejla, CFP®: If I go back to the first year, just starting and get, you know again we had the Y, and then it was a matter of all right. Well, what's the what's the fastest path to to get to that? Why, of of making making an extra 100 so 100 grand or so? Say, well, I need to. I need to work on my fees.

510

01:36:38.810 --> 01:37:03.489

Adam Cmejla, CFP®: Okay, I could either raise my fees on new clients or I could go back to my existing client. I go back to my existing clients. Okay, how do I do that? I can go back to the feed lesson, or I can talk with, okay, how do I do that? I can get like when you just start asking yourself the questions of the dominos that need to stack up. If I take the like that, then led into having the conversations around raising fees, and then it came down to. If it's like, I'm gonna raise fees. Well, then, what's service model look like?

511

01:37:04.190 --> 01:37:29.499

Adam Cmejla, CFP®: Alright? Well, let's take an inventory of what my service model looks like. And well, okay. So I was kinda hodgepodge service model. Alright. So now and then that rate that that went into the fee structure which then led into the ideal client avatar, which then led down the niche path. And then, when I started the podcast, then I didn't know what the hell I was doing, I started a podcast, it's like a watched, a couple of Pat, Flynn videos on Youtube, and a friend of mine here in town, local Justin Costelli, head of his podcast and

512

01:37:29.870 --> 01:37:50.169

Adam Cmejla, CFP®: Hey. When I got together for lunch. And now he he went mixing board and all this stuff, and he edited from day one. I'm like, I know enough to know I've been in this program called Limitless. I know I don't want to. They're all about ruthless delegations. So if you're gonna edit your own, I do not even want to know how to open up garageband. So I'm gonna edit, I'm gonna have someone else, edit.

513

01:37:50.370 --> 01:38:10.629

Adam Cmejla, CFP®: And then it was just a matter of okay. The podcast then led into additional opportunities to speak, which then led into the opportunity to write. So just when you start saying yes to one thing, or you just take action on one little thing. I know we've covered a lot in retreat. We've covered some things today. There's ample resources in the library.

514

01:38:11.220 --> 01:38:16.559



Adam Cmejla, CFP®: It it truly can be just writing down. All right. I'm gonna work on this next

515

01:38:16.660 --> 01:38:38.530

Adam Cmejla, CFP®: and put your faith and comfort in just taking that little bit of action that the next thing will show up as long as you're observant to that. Look at it and looking for, and if you feel like there's a gap there, that's why we're here to to step point and to was it? Sue? You know you posted? Maybe you should move this to question to good vibes. Yes, please do that. We're here to help you.

516

01:38:38.570 --> 01:38:41.559

Adam Cmejla, CFP®: Help you take that next best step for sure.

517

01:38:42.110 --> 01:38:45.839

Stephanie Bogan: Alright! How are you all feeling, Rashani? How are you feeling right now?

518

01:38:48.830 --> 01:38:51.659

Stephanie Bogan: You're on mute. Sorry you're you're feeling quiet.

519

01:38:51.800 --> 01:38:54.989

Roshani Pandey: No, I feel good. I feel like I have

520

01:38:55.270 --> 01:38:59.789

Roshani Pandey: lots of things I want to do next. So doing. Good.

521

01:39:00.080 --> 01:39:03.790

Stephanie Bogan: Awesome. Let's see. Anja, how about you?

522

01:39:07.660 --> 01:39:20.810

Anja Luesink: Hey? I feel. Yeah, that I have a pass going forward. And the one thing I have to do is ask for help because I have been looking for it on the website myself.

523

01:39:21.580 --> 01:39:37.019

Stephanie Bogan: But I think that you can easily point me in the direction. Yep, and I think, Todd, you had a comment on on chat it like there are a lot of resources under each lesson because we're giving you like samples and different versions of worksheets. And, like Jed sample

524

01:39:37.020 --> 01:39:59.350

Stephanie Bogan: in the action section on each of the lessons are the core actions, and it will direct you to the very specific worksheets. Right? Like, Go complete the my limitless life or my, those are the ones you wanna focus on everything else in there is what we'll call supplemental. Right? It's an example, a sample, a script. And I know when you log in, and there's like 25 things. Wait till you go into the prospect process folder.

525

01:39:59.370 --> 01:40:13.009

Stephanie Bogan: There's like lots of things right? Because we have, like a whole discovery guide filled



with questions like how to build out your whole meeting like, there's a lot of resources so focus on the action section.

526

01:40:13.540 --> 01:40:30.770

Stephanie Bogan: Those are intentionally, strikingly simple. Go, read this guidebook. Go do this worksheet right? And to Adam's point, as you start digging in, you start connecting the dots, and if you run into, you know, you get stumped by something, then you just reach out on a call or inbox or tribe, and we'll be happy to help. So

527

01:40:31.120 --> 01:40:46.670

Stephanie Bogan: these are 10 steps that you're gonna see integrated or 10 concepts you're gonna see integrated into limitless over and over again. Stay accountable right? That's your success shifter. And your Kpi worksheet which we'll talk about next month, so don't feel the need to jump ahead. We're gonna chunk you through it.

528

01:40:46.870 --> 01:41:00.289

Stephanie Bogan: Practice patience with yourself when you feel overwhelmed. Be like, I just joined a program where I'm turning everything upside down for a bit, and it's gonna feel overwhelming. But I know that I'm gonna lay this crap brick by brick, and it's gonna be okay.

529

01:41:00.930 --> 01:41:07.560

Stephanie Bogan: I can be patient with myself. I don't have to. It took me X number of years to get it here. I'm not going to fix it in 30 days, like

530

01:41:07.610 --> 01:41:14.469

Stephanie Bogan: right. This, too, shall pass. I just got to show up and do the work. If I show up and do the work right, it'll work, seek, support.

531

01:41:14.580 --> 01:41:26.669

Stephanie Bogan: positive visualization. Right? Really, get clear on what you want to create. This is fantastic for that daily practice which we'll talk more about next month. Celebrate small wins. That's why we start calls with wins

532

01:41:27.210 --> 01:41:44.130

Stephanie Bogan: right? You need to every week. Ask yourself, what did I accomplish? Week, what? What? Why? Was it important? Right? You need to seed your brain with success over and over again in real life and in your imagination, because your brain does not know the difference between what's real and what's imaginary. It just creates whatever you think about

533

01:41:44.470 --> 01:42:12.880

Stephanie Bogan: and consistency compounds. If you're getting outcomes that you don't like or enjoy, it means your thought habits, your behavior, habits, or your business habits are compounding into an outcome you don't like, and we've got to go back and check the thought habit, the behavior habit, or the business habit to figure out what to unwind and put something more aligned and positive in its place because we actually know the consistency compound. So those are just core thoughts. Just to keep you focused. We wanted to end



534

01:42:12.980 --> 01:42:40.689

Stephanie Bogan: on sort of an inspirational high note for this week. I know it feels like a lot in the beginning, but hopefully, with the stories that you've heard Adam throughout the year. Stories like Jed's. Jeff's on the line, Jim, you know it really does. The plan will work if you work the plan. This quarter is about setting yourself up for success so that you can get clear with that vision. You can get focused on the 3 priorities that you really need to move the needle on this year.

535

01:42:40.690 --> 01:42:57.059

Stephanie Bogan: and you can get to work on your next best step. If you do that, everything's not just gonna be okay in a year. It's gonna be unrecognizably better. You guys thank you so much for the time today, Adam, as always. Thanks for your insights. If you need help support, you have questions. You need to get unstuck.

536

01:42:57.090 --> 01:43:03.750

Stephanie Bogan: Mindset calls on the twentieth. Drive an inbox to there, if you need them. You guys go forth, do great things, and remember

537

01:43:03.910 --> 01:43:08.939

Stephanie Bogan: your life is now in session. Go, make the most of it. Have a great day.

