

LIFESTYLE

PEAK PRACTICE

COACHING CALL



FEBRUARY 2024



CLARIFYING
YOUR VISION



CREATING POSITIVE
PERSONAL HABITS



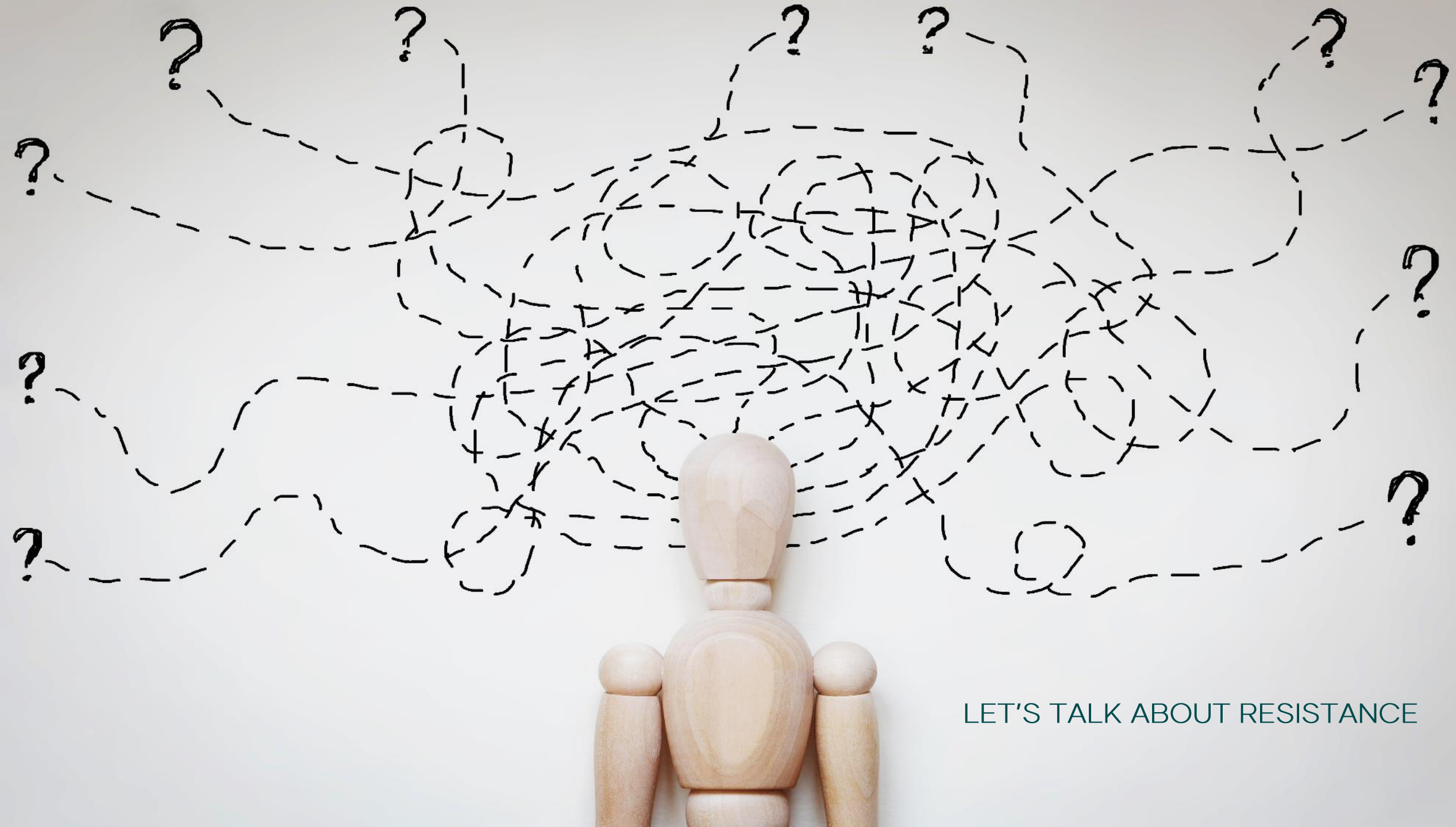
BUILDING
ACCOUNTABILITY
SYSTEMS

OUR FOCUS
THIS QUARTER



This Month's Topic

IMPLEMENTING CHANGE



LET'S TALK ABOUT RESISTANCE

- My Model Practice
*Base Camp Learning Path
- Your Vision For Success
*Base Camp Learning Path
- Science of Success
- Taking Control of Your Time
- High-Performance Happiness
- Strategic Planning
- Managing Firm Performance
- Managing Plans, Project & Priorities
- Action & Accountability



PERFORMANCE
SUMMIT

Limitless Advisor SUMMIT ACTION PLAN

Use this form to set your priorities and actions for the quarter

NAME: Ima Awesome
 YEAR: 2024
 QUARTER: Q1 (Performance Summit)

This Quarter's Priorities

BIG Priority: 3-Yr Vision

Big Why & Desired Outcomes

Clarify the outcome you want to create, the benefits of achieving it and why it's important to you.

\$1M/100 days, 30-hr weeks, travel lifestyle

ACTION	DUE DATE	OWNER	NOTES
ACTION 1: Complete 3-year Vision and My Model Practice practice worksheets			
ACTION 2: Draft 1-pg Business Plan (pick top 3-4 objectives for the year)			
ACTION 3: Share vision/goals with team			
ACTION 4: Schedule time to work on Q1 priorities			
ACTION 5: Review Vision/progress in Friday Check-In & monthly team meeting			

Progress Priority: Time Systems

ACTION	DUE DATE	OWNER	NOTES
ACTION 1: Set up 2024 Annual Calendar			
ACTION 2: Implement Model Weekly Schedule (surge and non-surge)			
ACTION 3: Delegate Email to Asst (get Asst to delegate to)			
ACTION 4: Implement Email 2x Day ONLY policy!			
ACTION 5: Start prep for Client Meeting Surges (Fall or Spring 2025)			

Progress Priority: Accountability Model (Launch Process)

ACTION	DUE DATE	OWNER	NOTES
ACTION 1: Watch Action & Accountability lesson; Managing Performance (advanced)			
ACTION 2: Fill out Key Performance Indicator worksheet; start tracking quarterly			
ACTION 3: Schedule Quarterly LAUNCH meetings; prep Agenda			
ACTION 4: Set up and start using Success Shifter to develop happy, high-performance habits			
ACTION 5: Start a Daily Practice to improve performance and well-being			

Reference and use the On-Purpose Project Planner to help you effectively scope, implement and manage each priority for optimal results.



Limitless To-Do Plans



LIMITLESS

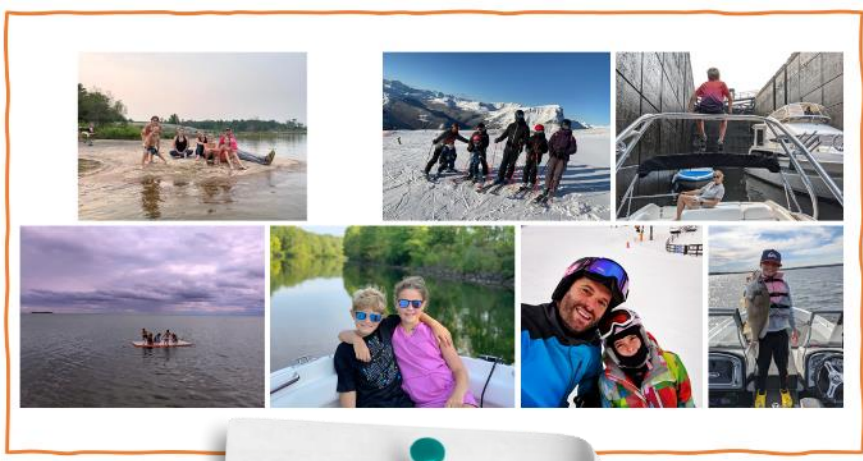
Jed's

LIMITLESS
LIFE BOOK



MY BIG WHY

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



\$1MM REVENUE

80 DAYS OOO

32 HOUR WEEKS

60% EBOC

80 IDEAL CLIENTS

MISSION

OUR WHY

THE ENDURING REASON FOR THE COMPANY'S WORK

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

VISION

OUR WHERE

YOUR DESIRED FUTURE STATE, WHAT YOU ENVISION FOR THE FIRM

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

VALUES

OUR WHAT

THE BELIEFS AND BEHAVIORS THAT GOVERN YOUR CULTURE AND DECISIONS

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

3 Year Vision

The Top 3 Priorities for The Year



IMPLEMENT SURGE MEETINGS



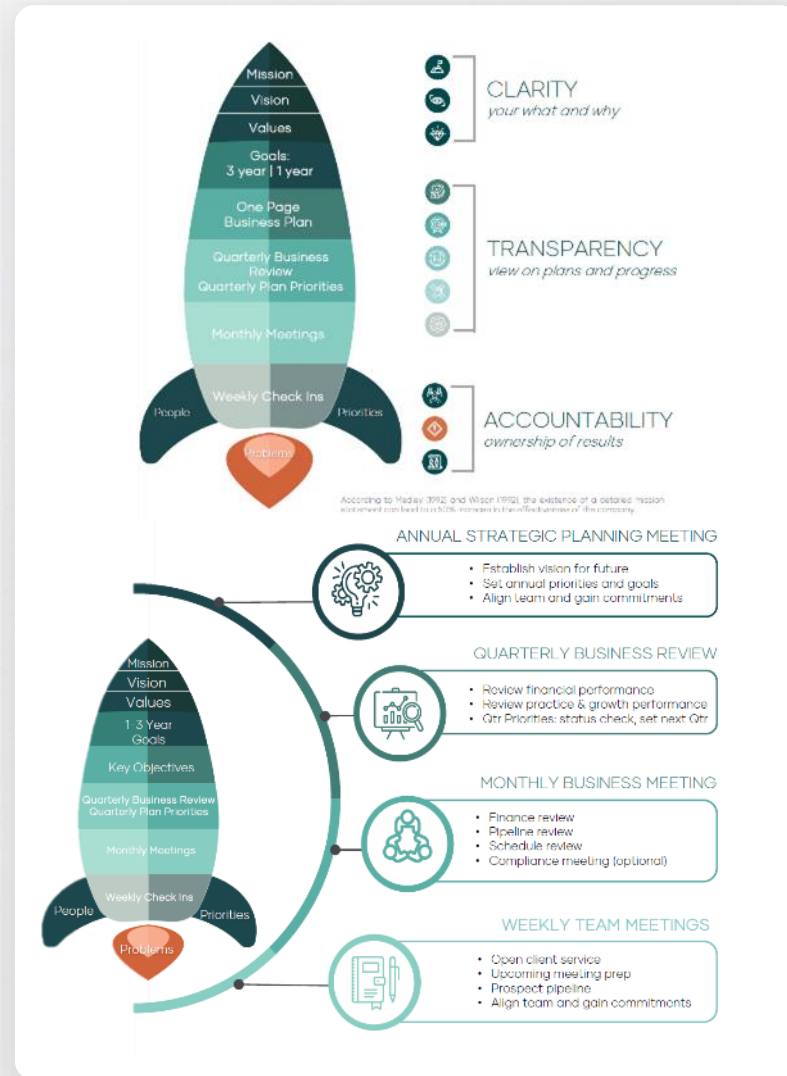
DEFINE WHO WE SERVE BEST & A SERVICE MODEL FOR DOING SO



START USING 1-PAGE PLANS

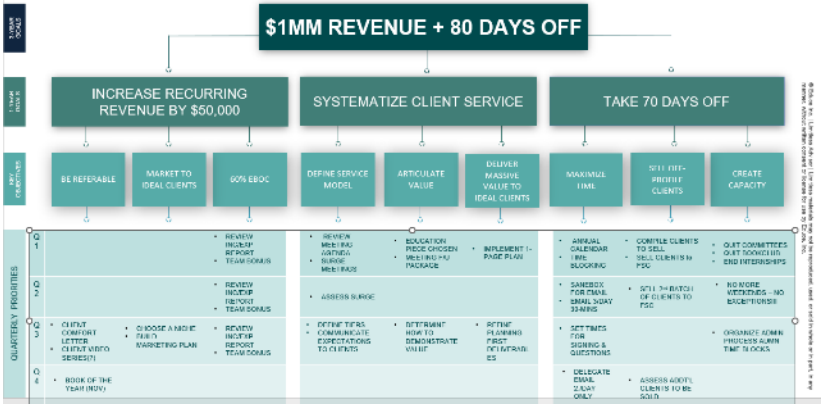
	CURRENT (YE 2021)	1-YEAR GOAL (YE 2022)	3-YEAR GOAL (YE 2024)	WHAT WILL IT TAKE?
REVENUE	\$627,000 (+\$259,000 Other Revenue) \$886,000	\$685,000 (+\$250,000 Other Revenue) \$935,000	\$750,000 (+\$250,000 Other Revenue) Total Revenue: \$1,000,000	-Sell off-profile clients -Sell (most) clients being serviced by other advisors -Develop & Focus on a niche
AUM	\$70,000,000	\$70,000,000	\$80,000,000	-Grow Jed's client base with ideal clients -Have other work off-niche clients (or sell)
AVG REV/CLIENT	\$1,549 (\$627,000/405)	\$2,740 (\$685,000/350)	\$3,000 (\$750,000/250)	-Trim unprofitable clients -Nurture and duplicate T1's -Max of 100 'other' clients
# OF DAYS OFF	20	70 (Summer Fridays & Ski Bees)	80	-Surge Meetings -Refine/Define Service Model -Clear processes that team uses and understands
HOURS PER WEEK	40+	36	32	-As above
# OF IDEAL CLIENTS (\$5,000 OR \$2,500 + GROWING/YR)	48 (Total 600)	60 (Total 350)	80 (Total 250)	-Wow service model -Deliver massive value client meetings (and in between) -1-page plan/Planning First -Referrals: Our client experience IS our marketing! -Develop a marketing plan

The Limitless Life Launch





2022 1-Page Business Plan

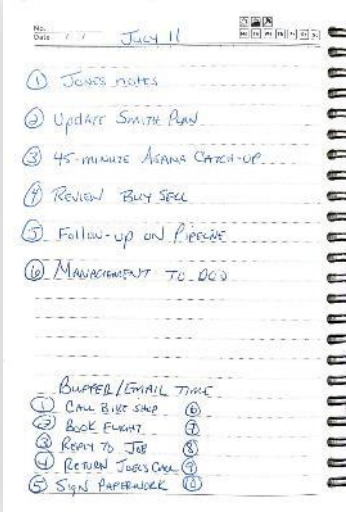


TAKE CONTROL OF YOUR TIME

MORNING ROUTINE

5:30 AM	DAILY STOIC READING, 20 MINUTES MEDITATION
6:00 AM	EXERCISE
7:00 AM	COFFEE & BREAKFAST
7:30 AM	WORKSHEET WITH KIDS
8:00 AM	SHOWER & DRESS

IVY LEE / GETTING THINGS DONE INSPIRED DAILY TO DO LIST



Must Do's

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

Annual Calendar Template

January 2022	February 2022	March 2022	Calendar Key OFFICE CLOSED MEETING PREP/FOLLOW-UP/SALES & CALL LOG OOO OOO
April 2022	May 2022	June 2022	
July 2022	August 2022	September 2022	
October 2022	November 2022	December 2022	

Surge Week

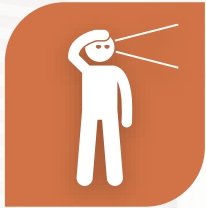
	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	
7:00	Prep & Management & Coaching	Client: Meetings, Plans & Promises (P&P)	Client: Meetings, Plans & Promises (P&P)	Client: Meetings, Plans & Promises (P&P)	Plans & Promises Catch-up OR Out of Office	7:00
7:30						7:30
8:00						8:00
8:30						8:30
9:00	File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

Non-Surge Week

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

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

The End



DO YOU HAVE A CLEAR & COMPELLING VISION?
YOU NEED A WHY BIGGER THAN YOUR WHAT IF'S



DO YOU HAVE HAPPY, HIGH-PERFORMANCE HABITS?
YOUR THINKING & YOUR HABITS DEFINE YOUR WORK, WEALTH & WELL-BEING



WHAT ARE YOUR PERSONAL and PRACTICE ACCOUNTABILITY SYSTEMS?
THE SYSTEMS MUST BE STRONGER THAN THE RESISTANCE THEY WILL FACE

Limitless Advisor
SUMMIT ACTION PLAN

Use this form to set your priorities and actions for the quarter

NAME: Ima Awesome
YEAR: 2024
QUARTER: Q1 (Performance Summit)

This Quarter's Priorities

BIG Priority: 3-Yr Vision

Big Why & Desired Outcomes

Clarify the outcome you want to create, the benefits of achieving it and why it's important to you.
\$1M/100 days, 30-hr weeks, travel lifestyle

- | ACTION | DUE DATE | OWNER | NOTES |
|--|----------|-------|-------|
| ACTION 1: Complete 3-year Vision and My Model Practice practice worksheets | | | |
| ACTION 2: Draft 1-pg Business Plan (pick top 3-4 objectives for the year) | | | |
| ACTION 3: Share vision/goals with team | | | |
| ACTION 4: Schedule time to work on Q1 priorities | | | |
| ACTION 5: Review Vision/progress in Friday Check-In & monthly team meeting | | | |

Progress Priority: Time Systems

- | ACTION | DUE DATE | OWNER | NOTES |
|--|----------|-------|-------|
| ACTION 1: Set up 2024 Annual Calendar | | | |
| ACTION 2: Implement Model Weekly Schedule (surge and non-surge) | | | |
| ACTION 3: Delegate Email to Asst ; Email 2x day ONLY; Social Media timer @ 30min max | | | |
| ACTION 4: Start Daily Practice and Friday Check Ins | | | |
| ACTION 5: Start prep for Client Meeting Surges (Fall or Spring 2025) | | | |

Progress Priority: Accountability Model (Launch Process)

- | ACTION | DUE DATE | OWNER | NOTES |
|--|----------|-------|-------|
| ACTION 1: Watch Action & Accountability lesson; Managing Performance (advanced) | | | |
| ACTION 2: Fill out Key Performance Indicator worksheet; start tracking quarterly | | | |
| ACTION 3: Schedule Quarterly LAUNCH meetings; prep Agenda | | | |
| ACTION 4: Set up and start using Success Shifter to develop happy, high-performance habits | | | |
| ACTION 5: Start a Daily Practice to improve performance and well-being | | | |

Reference and use the On-Purpose Project Planner to help you effectively scope, implement and manage each priority for optimal results.

Q1 / SUMMIT ACTION PLAN



One-Page Business Plan

Your Limitless Launch Plan

\$1M REVENUE + 100 DAYS OFF

TAKE 60 DAYS OFF

- Maximize time
- Focus on S.I.C.K.O. (S, I, C, K, O)
- Hit part-time decisions

AUTOMATE WORK-FLOWS

- Build Client Service Model
- Create core processes
- Automate workflows

MY BIG WHY

To simplify the process and through ownership simple and efficient processes so that I can create time, opportunities, and growth experiences for myself and those people in my life.



CLARIFY YOUR VISION

- Big Why
- Business Vision / Model Practice
- Practice Business Plan
- Limitless Business Plan
- Limitless Life Book

the MIRACLE MORNING

THE MOST OBVIOUS SECRET GUARANTEED TO CHANGE YOUR LIFE

HAL ELROD

MANAGING STEPHANIE'S EMAIL INBOX

PROCESSES: Daily Review, Daily Reply

ANALYZE THE INBOX PROCESS: The goal is to get your inbox empty by the end of the day (EOD) and to have a clear understanding of your inbox.

GOALS: The goal is to get your inbox empty by the end of the day (EOD) and to have a clear understanding of your inbox.

IMPLEMENT: Create a system to manage your inbox by the end of the day (EOD) and to have a clear understanding of your inbox.

MEASUREMENT: Measure the number of emails in your inbox at the end of the day (EOD) and the number of emails replied to.

QUESTIONS: How do you manage your inbox? How do you reply to emails?



CREATING POSITIVE PERSONAL HABITS

- Daily Practice
- Email 2x day Only
- Delegate your Email
- Weekly Check-In

Success Shifter

Key Performance Indicators Dashboard

KEY DATA POINTS

Category	Value
Total # of Clients	100
Total # of Professional SOPs	100
Client KPI	100
Success Shifter	100
KPI	100



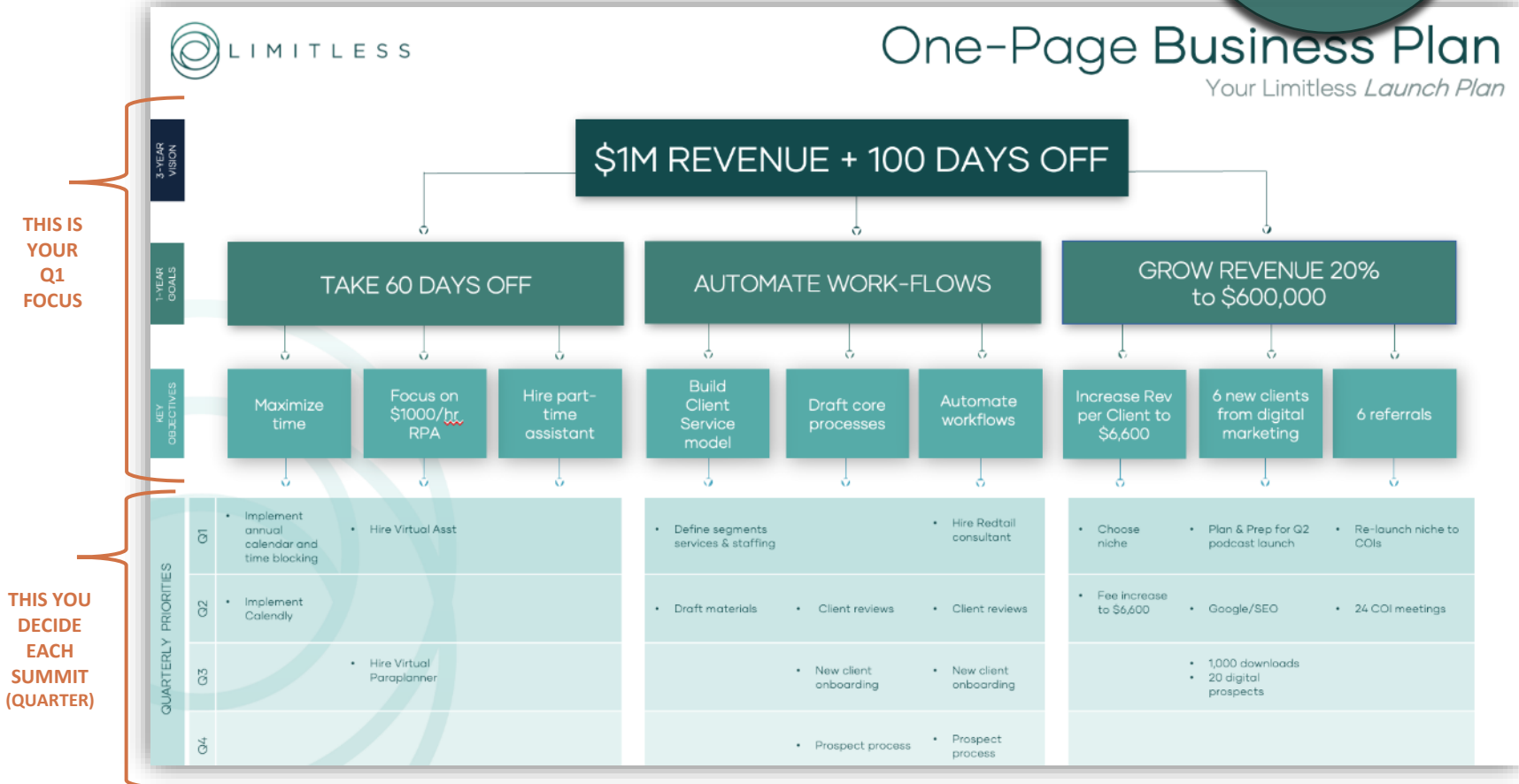
BUILDING ACCOUNTABILITY SYSTEMS

- Success Shifter
- KPI Worksheet

FEBRUARY ASSIGNMENTS

1
BUILD
1-PAGE
BIZ PLAN

2
ELEVATE
YOUR
EMAIL



MANAGING STEPHANIE'S EMAIL INBOX

PROCESS

Process Owner: Executive Assistant
Frequency: Daily

WHAT IS THE INBOX PROCESS?
The process by which you review Stephanie's inboxes (Email, LACP, LinkedIn) and process all incoming messages.

ROLE
The Executive Assistant's role is to manage Stephanie's email so that it is processed and/or presented to Stephanie so that she can respond and direct work *efficiently*. Your job is to make sure she delivers on time, as promised, every time, and email is critical to meeting this standard.

THIS IS YOUR Q1 FOCUS

THIS YOU DECIDE EACH SUMMIT (QUARTER)

POST YOUR 1-PG BUSINESS PLAN ON TRIBE FOR FEEDBACK
NEED HELP, REQUEST FEEDBACK AND/OR SUBMIT FOR OFFICE HOURS

10 STEPS TO CREATE NEW LEVELS OF SUCCESS

To break old habits and build a better future, follow these top 10 steps



SELF
REFLECTION



CLEAR
GOALS



CREATE A
PLAN



REPLACE
BAD HABITS



STAY
ACCOUNTABLE



PRACTICE
PATIENCE



SEEK
SUPPORT



POSITIVE
VISUALIZATION



CELEBRATE
SMALL WINS



CONSISTENCY
COMPOUNDS

THE SYSTEM MUST BE STRONGER THAN THE RESISTANCE IT WILL FACE

Q&A

