

LIMITLESS Coaching Call Transcript

February 19th, 2024
Lifestyle Coaching Call
Personal Peak Practice

WEBVTT

28

00:11:07.930 --> 00:11:31.989

Liz Hand, CFP®: Hello, everybody happy Tuesday. I hope you had a good restful extra day off, or perhaps you worked yesterday, and that's cool, too. I did something that I don't do, which is, I like laid flat on my couch for about 3 h yesterday it was very restorative, and so funny to me the process of allowing myself to do that

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00:11:32.380 --> 00:11:37.199

Liz Hand, CFP®: like, have you ever just said I'm going to take an afternoon off, and I'm literally going to do nothing.

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00:11:37.810 --> 00:11:39.040

Liz Hand, CFP®: It actually.

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00:11:39.060 --> 00:11:42.240

Liz Hand, CFP®: it's just such a shift in your brain to allow you to do that.

32

00:11:42.670 --> 00:11:55.260

Liz Hand, CFP®: So excited for the new format that we're doing with our checking calls. We're going to start similar to what we had last week. So I'd like you to reflect on where you're at right now

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00:11:56.030 --> 00:11:59.710

Liz Hand, CFP®: you've invested your time and your money.

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00:12:00.130 --> 00:12:06.889

Liz Hand, CFP®: and your energy and your effort and your attention to this programme. and if you want the most out of it.

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00:12:07.130 --> 00:12:08.350

Liz Hand, CFP®: Take a little moment.

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00:12:08.540 --> 00:12:10.940

Liz Hand, CFP®: Reflect. Where am I in this program?



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00:12:10.990 --> 00:12:17.709

Liz Hand, CFP®: Where am I with the growth that I want to see for myself? And a one is, I'm doing great.

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00:12:17.880 --> 00:12:20.880

Liz Hand, CFP®: I'm motivated. I'm in momentum

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00:12:22.190 --> 00:12:23.639

Liz Hand, CFP®: 2 is

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00:12:23.670 --> 00:12:32.250

Liz Hand, CFP®: Ok, a little bit of sluggishness, or there's something here. But I'm feeling pretty good. I'm still moving, and 3 is a place of feeling stuck

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00:12:32.800 --> 00:12:34.020

Liz Hand, CFP®: for.

42

00:12:34.900 --> 00:12:36.990

Liz Hand, CFP®: confused or

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00:12:38.110 --> 00:12:44.079

Liz Hand, CFP®: annoyed or concerned. You know it can be pretty much any emotion that has you in a place of stillness.

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00:12:45.520 --> 00:12:50.950

Liz Hand, CFP®: So go ahead and pop that in the chat. Thank you for those who have started. Put a bit of tunes.

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00:12:51.230 --> 00:12:53.760

Liz Hand, CFP®: couple ones awesome

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00:13:00.720 --> 00:13:03.100

Liz Hand, CFP®: while Bright energized Anya.

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00:13:06.460 --> 00:13:08.949

Liz Hand, CFP®: Lots of twos, lots of ones.

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00:13:12.300 --> 00:13:17.569

Liz Hand, CFP®: 2.5. Tod didn't quite want to commit to the 3 or the 2

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00:13:17.620 --> 00:13:18.650

Liz Hand, CFP®: love that



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00:13:21.540 --> 00:13:26.949

Liz Hand, CFP®: all right. And if you're just joining us, what we're doing is we're taking a moment to reflect your

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00:13:27.270 --> 00:13:30.669

Liz Hand, CFP®: almost 2 full months into the limitless programme.

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00:13:31.820 --> 00:13:33.910

Liz Hand, CFP®: Where are you? At one

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00:13:34.750 --> 00:13:47.429

Liz Hand, CFP®: feeling? Lots of momentum 2. A little bit of a slow down, but still feel pretty good about it. 3 as you'd like some support. Maybe you feel stuck. Maybe you feel confused. Maybe you feel angry, annoyed. Any type of emotion that comes up

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00:13:48.260 --> 00:13:49.440

Liz Hand, CFP®: concerned.

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00:13:50.440 --> 00:13:51.400

Liz Hand, CFP®: All right.

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00:13:52.660 --> 00:14:00.350

Liz Hand, CFP®: So 2 ish. Marianne, would you say? Pewish on twitch towards one or twoish towards 3?

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00:14:05.510 --> 00:14:07.680

Liz Hand, CFP®: 3 cool, alright.

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00:14:08.130 --> 00:14:23.969

Liz Hand, CFP®: So for Marianne, if you don't mind coming off mute and just sharing where you're at and just, you know, I don't know how familiar you are with mindset calls. Maybe this is your first official designated mindset. Call where it's open ended.

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00:14:24.000 --> 00:14:26.230

Liz Hand, CFP®: For your consideration.

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00:14:26.780 --> 00:14:35.500

Liz Hand, CFP®: If there is something that you felt stuck on last week, and you came to the the other office hours where they talked about practice management.

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00:14:35.680 --> 00:14:39.529

Liz Hand, CFP®: If you're still feeling stuck. use that same prompt

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00:14:39.690 --> 00:14:48.189

Liz Hand, CFP®: and bring it to the mindset call because oftentimes it's not just the how. Maybe once we get clear on the how, there's still that underlying peace.

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00:14:48.470 --> 00:14:51.210

Liz Hand, CFP®: So yes, Marianne, where are ye?

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00:14:52.670 --> 00:14:55.320

Marianne Nolte, CFP®: Right here got the audio right?

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00:14:55.870 --> 00:14:58.170

Liz Hand, CFP®: So what what makes it a free. Today

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00:14:58.370 --> 00:15:09.309

Marianne Nolte, CFP®: I'm I'm making progress. And I want to say that right up front I do know I'm making progress, and I'm excited about that. I'm finding a lot of clarity

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00:15:09.490 --> 00:15:13.020

Marianne Nolte, CFP®: and I think that the reason I'm a little

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00:15:13.670 --> 00:15:15.130

Marianne Nolte, CFP®: stuck, ish.

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00:15:15.220 --> 00:15:18.820

Marianne Nolte, CFP®: is that I I guess I'm

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00:15:19.070 --> 00:15:23.640

Marianne Nolte, CFP®: a custom, just sitting on my side of the desk instead of the client side of the desk.

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00:15:23.740 --> 00:15:33.779

Marianne Nolte, CFP®: And and I'm not a big, touchy, feely person. In the first place. And so I'm just trying to be open minded

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00:15:33.960 --> 00:15:41.819

Marianne Nolte, CFP®: and have conversations with people when we go into the chat rooms and all. But it's not my warm and fuzzy place and

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00:15:42.170 --> 00:15:50.220

Marianne Nolte, CFP®: so that's just new to me. And I can. I can deliver it to the clients. I just am not good on the receiving end of it.

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00:15:50.330 --> 00:15:51.540



Marianne Nolte, CFP®: And

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00:15:51.750 --> 00:15:56.829

Marianne Nolte, CFP®: so, you know, and like everybody, hey, life is really busy right now, and and

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00:15:57.550 --> 00:16:08.590

Marianne Nolte, CFP®: so that's what has me in this position. But I am making progress. I do like to see the good steps that are moving forward right now.

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00:16:08.690 --> 00:16:14.310

Liz Hand, CFP®: Yeah. Well, thanks for your transparency. I have it that many of us experience that

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00:16:15.480 --> 00:16:22.380

Liz Hand, CFP®: when we're in this space cause, it's it is transparency. It's being like, hey, this is the stuff that's not working for me.

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00:16:22.760 --> 00:16:37.569

Liz Hand, CFP®: and it's a place of vulnerability. So we can definitely touch on that for who else? Said Jewish. I'm going to jump around and kind of get around Robin to see what the themes are, and then we'll jump in Todd, mister, 2.5.

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00:16:39.090 --> 00:16:50.149

Todd Doobrow: Can you come off mute, and share a little bit with me? I can. And I'm sorry, guys. I'm in the middle of a construction zone, which is why, I'm muting right now. Oh, good! Yeah. Same thing. I've

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00:16:50.430 --> 00:16:58.220

Todd Doobrow: I'm the son of a military family, so I've always been very good at processes and procedures and staying to it. And I know.

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00:16:58.240 --> 00:17:06.640

Todd Doobrow: like I know, there's something here that I need to do to push myself a little bit farther. I'm just having a hard time kind of putting the finger on it, because

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00:17:06.770 --> 00:17:20.409

Todd Doobrow: when you're in the military, and they beat it into your head that this is the way that we do it. Don't ask any questions. You know, for the last 40 plus years that's kind of the mentality that I've had is, do it the way it's been done, and don't ask questions. So so now here we are.

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00:17:20.599 --> 00:17:27.009

Todd Doobrow: ask questions about everything, and turn everything on its head. So it's just it's just taking a little bit longer to

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00:17:27.079 --> 00:17:28.089

Todd Doobrow: to get it



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00:17:28.119 --> 00:17:42.999

Todd Doobrow: on paper. From my head like I can see the value. I can hear other people saying they're having this awesome success which is great, but I kinda feel like I have a good grip on my business already. And when you combine that with

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00:17:43.030 --> 00:17:47.959

Todd Doobrow: not asking questions, and don't push back, you get kind of stuck. So that's where I am.

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00:17:48.250 --> 00:17:49.020

Liz Hand, CFP®: Hmm!

89

00:17:50.940 --> 00:17:52.090

Liz Hand, CFP®: And

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00:17:53.220 --> 00:17:58.050

Liz Hand, CFP®: when you feel stuck. What is the thing that you are trying to surface?

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00:17:58.530 --> 00:18:01.890

Todd Doobrow: So it it's what's not what's not working.

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00:18:02.000 --> 00:18:04.889

Todd Doobrow: what's not working, what's not working, and that's

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00:18:04.980 --> 00:18:13.279

Todd Doobrow: if you're comfortable with where you are and everything's working just fine. Then you know why? Why do we need to make the change? And obviously the answer is because

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00:18:13.700 --> 00:18:17.110

Todd Doobrow: there's a heck of a lot more out there that you can be exposed to. But

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00:18:17.120 --> 00:18:26.169

Todd Doobrow: but when it's comfortable, then you know. why make it uncomfortable. So it's it's that age, old problem that we've all probably had a thousand times in our careers.

96

00:18:26.680 --> 00:18:30.030

Liz Hand, CFP®: Got it. And as you hear yourself say that.

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00:18:30.500 --> 00:18:34.760

Liz Hand, CFP®: Do you have a hunch? What's not working for you in your practice?

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00:18:35.780 --> 00:18:42.079



Todd Doobrow: No, I I'm big on time efficiency. And I know there's there's probably ways that I could.

99

00:18:42.270 --> 00:18:45.939

Todd Doobrow: I could, you know, be working more efficient in terms of

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00:18:46.970 --> 00:18:54.840

Todd Doobrow: client management in terms of you know all the stuff that we have to do on a daily basis. So again, I know it's out there. It's just a matter of putting it all together and and

101

00:18:55.090 --> 00:19:07.390

Todd Doobrow: like like Mary Ann said before me, it's not the the warm and fuzzy side is. I'm very warm and fuzzy towards everyone else. At least I try to be inside. It's just a little bit different. So

102

00:19:07.900 --> 00:19:08.750

Liz Hand, CFP®: yeah.

103

00:19:10.140 --> 00:19:16.330

Todd Doobrow: all right. Thank you for sharing that, Todd. Yep, I'm going to go unmute you on. Offer your hammers an

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00:19:16.460 --> 00:19:17.450

Todd Doobrow: chainsaws.

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00:19:20.730 --> 00:19:23.259

Liz Hand, CFP®: Ok, and Rashani.

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00:19:26.070 --> 00:19:45.400

Roshani Pandey: So you know, I put 3 there. So we can ask any question, right? Or is it okay? Alright, so I'm thinking of increasing my fees this year. And it's going to be some of my first clients, the clients that I

107

00:19:45.480 --> 00:19:56.499

Roshani Pandey: you know that that signed with me. Like, when I first started. And I'm thinking of, you know, increasing their fees like a double. So it's going to be 100% increase.

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00:19:56.760 --> 00:20:05.740

Roshani Pandey: And I'm just a little. you know, like concerned about how it's going to be received. So

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00:20:06.280 --> 00:20:14.200

Roshani Pandey: so yes. So that's that's my concern. And how do I explain this to them? And you know what they will think of me? And what if they

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00:20:14.420 --> 00:20:21.219

if they leave, you know which would be, you know, pretty catastrophic for me, I think, because it's you



know they've been such a great clients

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00:20:21.300 --> 00:20:35.290

Roshani Pandey: but even if they don't leave, but they just like change their opinion about me a little bit. You know that that would also not be so great because they've all. They've always been such big appreciators of me, and they've talked about me to their friends.

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00:20:35.380 --> 00:20:36.510

Roshani Pandey: I've gotten

113

00:20:36.890 --> 00:21:06.590

Roshani Pandey: one referral from them. You know, one successful referral from them. So those those are some of my concerns. And I have. I have thought about many times about how I'm going to bring this up with them. About all the reasons, you know. Inflation, of course. And I hired some employees this year, so that has increased the cost, and just my cost itself has gone up like 3 or 4 times since I started. So those are all good reasons. But when I think of doubling the fees like when I put myself in their shoes and think.

114

00:21:06.590 --> 00:21:12.870

Roshani Pandey: oh, she's doubling the fees like, what the hell! And you know they're gonna start asking like, what

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00:21:13.020 --> 00:21:17.840

Roshani Pandey: like, what is she even doing for us? That warrants that kind of that kind of fee increase.

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00:21:18.110 --> 00:21:38.930

Roshani Pandey: you know. Th, those are the the questions I'm kind of struggling with. And I think it goes back to the mindset a lot. And and I love the mindset. Actually, I'm using it for so many other areas of my life as well, the the mindset and the success shifter, and all of those I've been using it. So those are all good. But I still have not been able to get over that hump of

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00:21:39.170 --> 00:21:42.779

Roshani Pandey: of being comfortable going to them with this, ask.

118

00:21:43.190 --> 00:21:47.979

Liz Hand, CFP®: okay. cool. Thank you for sharing that Rashani?

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00:21:49.000 --> 00:21:53.720

Liz Hand, CFP®: Anybody else want to jump in with a

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00:21:54.250 --> 00:21:57.030

Liz Hand, CFP®: Laura? 2 ish, is that more towards the 3

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00:21:57.060 --> 00:21:58.900



Liz Hand, CFP®: or the one?

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00:21:59.550 --> 00:22:01.180

Laura Chanin: No, towards a 3.

123

00:22:01.220 --> 00:22:10.010

Laura Chanin: Yeah. Mine, so I think slightly similar to Roshani, although different, and I've gone one extreme to the other. Last week I

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00:22:10.030 --> 00:22:22.130

Laura Chanin: went through and figured out all my costs, which was super empowering and understanding. Okay, this is the minimum client size I need, which I've avoided doing for years. So it's very happy on that.

125

00:22:22.550 --> 00:22:34.780

Laura Chanin: But then the next part of it was, I figured out how many clients I have, and if I wanted to do those search meetings, how much time it would take, and I have way, too many small clients, and I know that. But

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00:22:35.100 --> 00:22:36.070

Laura Chanin: I

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00:22:36.580 --> 00:22:43.520

Laura Chanin: scared to get rid of them, and I many of them I've known for years. Some are like friends or family, and it's like

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00:22:44.280 --> 00:22:52.650

Laura Chanin: I know, logically, like I lose money on them, like you know, Stephanie's things like my big clients are paying for them.

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00:22:52.770 --> 00:23:00.169

Laura Chanin: but it's it's scary, and I don't really know how to change that. So that's why I feel kind of overwhelmed. And it's like

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00:23:00.290 --> 00:23:01.580

Laura Chanin: freaked out.

131

00:23:01.940 --> 00:23:03.160

Laura Chanin: Yeah, that's

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00:23:03.870 --> 00:23:10.030

Liz Hand, CFP®: thank you for sharing when you say scary. What's the what do you think might happen?

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00:23:11.440 --> 00:23:12.620

Laura Chanin: Know? It's

134

00:23:13.020 --> 00:23:22.120

Laura Chanin: like logically what you know feels like I'm even though rejecting them. It feels like I'm rejecting myself. I don't know what. If

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00:23:23.060 --> 00:23:25.560

Laura Chanin: what if someone thinks badly of me

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00:23:25.860 --> 00:23:35.579

Laura Chanin: I don't know, but I know, Roshani said. Like my cost of increase. It's like, and it's it's true. It's true. They just don't generate enough revenue. But I. So

137

00:23:35.850 --> 00:23:38.570

Laura Chanin: I know I'm kind of talking all over the place. But it

138

00:23:39.000 --> 00:23:41.360

Laura Chanin: feels scary and

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00:23:41.530 --> 00:23:44.259

Laura Chanin: what's being rejected, even though

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00:23:44.350 --> 00:23:46.270

Laura Chanin: it's the opposite of that. I think

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00:23:47.340 --> 00:23:54.959

Liz Hand, CFP®: I just want to acknowledge great awareness on that. It's rejecting them. But it's also rejecting me. And it just creates a lot of chaos. Ok? Yes.

142

00:23:55.150 --> 00:24:02.589

Liz Hand, CFP®: all right. With the time. We'll probably have the ability to cover both.

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00:24:02.900 --> 00:24:07.990

Liz Hand, CFP®: What I'm going to do is I'm going to invite both

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00:24:08.990 --> 00:24:14.600

Liz Hand, CFP®: Todd and Mary Anne to join me, and we're going to PIN both of them.

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00:24:14.910 --> 00:24:18.240

Liz Hand, CFP®: Do I have that ability? Alice centered? Do you need to do that.

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00:24:18.360 --> 00:24:19.960
Allison Foulk: Let me see.

147
00:24:22.100 --> 00:24:25.130
Allison Foulk: Okay, Marianne is PIN

148
00:24:27.060 --> 00:24:28.810
Allison Foulk: and pop.

149
00:24:32.930 --> 00:24:34.030
Liz Hand, CFP®: Okay.

150
00:24:35.060 --> 00:24:39.560
Liz Hand, CFP®: it's not doing that for me. So let me see, here

151
00:24:41.040 --> 00:24:43.480
Liz Hand, CFP®: is that working for everybody else. Can you see both of them?

152
00:24:46.450 --> 00:24:47.560
Liz Hand, CFP®: Or

153
00:24:48.560 --> 00:24:50.680
Allison Foulk: yes, I can see both of them.

154
00:24:51.850 --> 00:24:57.060
Liz Hand, CFP®: You went away. I'm trying to find you now.

155
00:24:57.320 --> 00:25:08.610
Liz Hand, CFP®: Yeah, it's perhaps you'd PIN. Okay. Any thumbs up or thumbs down from people, are they pinned? You can just see them or no. You see, everybody.

156
00:25:09.190 --> 00:25:12.440
Liz Hand, CFP®: Okay. I wonder if you just pinned it for yourself. Allison.

157
00:25:12.740 --> 00:25:13.910
Allison Foulk: Okay.

158
00:25:15.150 --> 00:25:20.439
Liz Hand, CFP®: spotlight. Maybe that's the word we want.

159
00:25:21.450 --> 00:25:22.880
Okay.



160
00:25:24.390 --> 00:25:25.650
Allison Foulk: let's see.

161
00:25:27.520 --> 00:25:32.239
Marianne Nolte, CFP®: Hey, Liz, before you throw us to the wolves. What are you doing in pinning us?

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00:25:32.970 --> 00:25:40.669
Liz Hand, CFP®: Oh, it's just so. I can see you from talking, and thank you for asking the question. It sounds like that made you feel a little vulnerable.

163
00:25:40.720 --> 00:25:54.259
Marianne Nolte, CFP®: It does because we are building right now, and we're living in our Rv. At the moment while we build our new property. So I'm you know, I've I took myself off of video.

164
00:25:54.660 --> 00:26:00.949
Liz Hand, CFP®: Would you be open to coming back on video? And just what do you need from the group to know about

165
00:26:01.960 --> 00:26:02.730
Liz Hand, CFP®: that

166
00:26:03.080 --> 00:26:13.539
Marianne Nolte, CFP®: right now. I'm living in a toy hall or trailer that's 2,200 square feet, with 2 giant golden retrievers on the floor. So life is a little topsy turvy at the moment.

167
00:26:13.650 --> 00:26:14.570
Liz Hand, CFP®: Yeah.

168
00:26:15.240 --> 00:26:16.740
Liz Hand, CFP®: yeah, okay.

169
00:26:16.770 --> 00:26:20.799
Liz Hand, CFP®: I think I've got it. So you guys are both spotlighted everybody else. See that?

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00:26:21.970 --> 00:26:32.739
Liz Hand, CFP®: Okay. And now my encouragement here with you, as you are on this mindset call is one key idea that I think is really supportive.

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00:26:32.920 --> 00:26:36.819
Liz Hand, CFP®: One. This is for Marian and Todd to know that.

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00:26:37.010 --> 00:26:41.889

Liz Hand, CFP®: Yes, they are. They are the ones being coached right now, but also

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00:26:42.150 --> 00:26:48.489

Liz Hand, CFP®: they are. They're giving the gift to each of you to see something that you may not be able to see in yourself.

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00:26:48.680 --> 00:26:56.869

Liz Hand, CFP®: And there's this idea with our subconscious. So we've got our conscious like the top of the iceberg. And then we've got the bottom of the iceberg. Our subconscious

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00:26:57.080 --> 00:27:00.300

Liz Hand, CFP®: our subconscious is always

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00:27:00.830 --> 00:27:02.010

Liz Hand, CFP®: projecting

177

00:27:02.590 --> 00:27:14.359

Liz Hand, CFP®: and seeing what part is me. So the idea here is, if if you spot it, you got it all right. So if you hear something from Marianne or Tod that you're like, oh, they got this thing.

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00:27:14.670 --> 00:27:17.240

Liz Hand, CFP®: Take a moment and reflect on yourself

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00:27:17.270 --> 00:27:18.300

Liz Hand, CFP®: because

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00:27:18.650 --> 00:27:34.490

Liz Hand, CFP®: you got it too. And so hopefully that also eases the minds of Marianne and Todd as you're here getting coached, that everybody here in this room is here to get coach themselves so they're gonna be looking for themselves the whole time that you guys are talking with me. All right.

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00:27:35.990 --> 00:27:42.869

Liz Hand, CFP®: So tut! I didn't hear any of the construction. You're welcome to come off mute for the whole time, too. If it gets bad, we'll let you know.

182

00:27:43.340 --> 00:27:44.100

Todd Doobrow: Alright.

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00:27:44.400 --> 00:27:45.350

Liz Hand, CFP®: all right.

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00:27:45.510 --> 00:27:51.730



Liz Hand, CFP®: So both of you talked about this discomfort with looking at your own practice.

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00:27:53.080 --> 00:27:57.520

Liz Hand, CFP®: and as you think about that. I kind of get present to it.

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00:27:57.750 --> 00:28:02.649

Liz Hand, CFP®: And then not touchy feely, where are you feeling the most

187

00:28:03.080 --> 00:28:04.090

Liz Hand, CFP®: tension

188

00:28:04.410 --> 00:28:07.350

Liz Hand, CFP®: right now, physically, for you and your body.

189

00:28:12.960 --> 00:28:15.099

Todd Doobrow: You can. You can just speak.

190

00:28:15.370 --> 00:28:16.440

Marianne Nolte, CFP®: Yeah.

191

00:28:16.760 --> 00:28:28.580

Marianne Nolte, CFP®: So so physically. I left shoulder. And I got a tendency unit over the weekend. And and that's really interesting that you'd ask physically, because

192

00:28:28.650 --> 00:28:43.949

Marianne Nolte, CFP®: I can march forward with the things I need to do in my business by creating processes, etc., and and Laura and Roshani. Pull the plug. I did it last over the last couple of months.

193

00:28:43.950 --> 00:29:01.030

Marianne Nolte, CFP®: and I raised my fees, and I didn't get eaten by the tiger and and I did get pushed back from 2 clients, and one is no longer a client, and that's okay. It was not a good fit, anyway, and the other one is still on board. We had a lot of discussions

194

00:29:01.090 --> 00:29:09.890

Marianne Nolte, CFP®: and it and it wasn't super fun. But it's done now. And so I'm really happy. I made that change.

195

00:29:10.030 --> 00:29:38.200

Marianne Nolte, CFP®: so, you know, jump off the cliff and number 2. I think that what I'm going to end up getting out of limitless is not necessarily just about my practice, but my personal life, because I was floored in one of the forms that you guys sent out. One of the questions was, and how do you feel about your romance life. Well, you know what life kind of sucks at the moment personally, because we're in a very uncomfortable place. And and



196

00:29:38.480 --> 00:29:50.230

Marianne Nolte, CFP®: you know I can't fix that, but I have my eye on the prize. I know that you know. Another few months want to move into our new place. It's gonna be fabulous. All that's great. But right now it's it's not a happy place.

197

00:29:50.250 --> 00:30:00.379

Marianne Nolte, CFP®: So I'm juggling something that I was ex not expecting to be juggling, which is facing my personal life. With limitless

198

00:30:00.430 --> 00:30:15.379

Marianne Nolte, CFP®: and but it it almost a shiny part of this is that it's making me go. Okay, I don't really wanna think about my personal life. So I'm gonna take the time to really drill in on my business.

199

00:30:15.560 --> 00:30:21.779

Marianne Nolte, CFP®: And it's, you know, some of these steps have been good, and and some of them have done a little bit difficult. But

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00:30:21.900 --> 00:30:31.380

Marianne Nolte, CFP®: as Roshani and Laura know getting ready to do that. See? Adjustment is very scary, but it's much better on the other side now.

201

00:30:32.980 --> 00:30:33.810

Liz Hand, CFP®: Okay.

202

00:30:34.770 --> 00:30:45.389

Liz Hand, CFP®: and what about you, Todd? Where are you feeling it physically? If there's tension as you think about you being the client, you not having the processes or procedure or having them, but then

203

00:30:45.410 --> 00:30:47.430

Liz Hand, CFP®: also need to determine what you want

204

00:30:47.470 --> 00:31:10.259

Todd Doobrow: for me. It's more. It's more just like a literal headache. You know, trying to figure out all this stuff. I I'm new to the limitless game. So you know, in the last 60 days, while while it has been 2 months, and that sounds like a long time. There's a lot of stuff to try to digest and figure out. What do you like, and what do you not like, and what's appropriate for you and what's not? And then you combine that with

205

00:31:10.280 --> 00:31:17.569

Todd Doobrow: my parent company. You know our our back office company, which is, is awesome, and I love it. But they're rolling out 3 or 4 different

206

00:31:17.580 --> 00:31:27.179

Todd Doobrow: new programs and strategies for us to use as well, you know. So you're just kind of



swimming in all this information, trying to figure out which one is best and most appropriate.

207

00:31:27.190 --> 00:31:52.169

Todd Doobrow: Not only for me as an advisor, but for me as a link between, you know our technology, what we have access to and our clients. So it's a lot of figuring out, you know. And as you listen to these calls again. I can hear the people say, I've been here 3 years, and it's awesome, and it's great. But you know that first day of kindergarten, it's unnerving for you, and you gotta just try to figure out what's right for you and the way that you do things.

208

00:31:54.410 --> 00:32:01.029

Liz Hand, CFP®: and just reading into what you said and comparing it to kindergarten. There's a way that you feel.

209

00:32:01.450 --> 00:32:06.449

Liz Hand, CFP®: What do you hear in that? When I reflect that back you just compare this to being in kindergarten

210

00:32:06.470 --> 00:32:19.910

Todd Doobrow: right? Well, you know, when you go to kindergarten, you know everyone has to do it. You know, it's for the greater good. You know you're gonna get a lot out of it. But that first day when Mom and Dad drop you off, you don't wanna let their hand go, and you know you're still kinda you're you're hesitant and reluctant to go.

211

00:32:20.300 --> 00:32:26.149

Todd Doobrow: So you know it's what you need to do. You know, it's going to be good in the long term. It's just a little unnerving in the short term.

212

00:32:27.700 --> 00:32:30.110

Liz Hand, CFP®: And who is mum and dad in this situation?

213

00:32:30.930 --> 00:32:32.280

Todd Doobrow: Just an analogy

214

00:32:32.330 --> 00:32:33.989

Liz Hand, CFP®: I know. Let's play with it

215

00:32:34.230 --> 00:32:34.940

Todd Doobrow: at

216

00:32:35.290 --> 00:32:39.189

Todd Doobrow: I don't. I don't know. I really don't. I mean I

217

00:32:39.820 --> 00:32:43.479

Todd Doobrow: I mean, I guess, in this metaphorical case. If I'm the one going to kindergarten.



218

00:32:44.060 --> 00:32:50.220

Todd Doobrow: I mean, my wife is probably one of them, and and you know the president of our company is probably another one. I don't know.

219

00:32:51.960 --> 00:32:52.690

Liz Hand, CFP®: Umhm.

220

00:32:53.880 --> 00:32:58.289

Liz Hand, CFP®: and and what's required of you as you let go of their hand

221

00:32:59.580 --> 00:33:05.949

Todd Doobrow: a lot of trust, a lot of listening. You know I'm I'm a big believer in 2 years, one month.

222

00:33:07.080 --> 00:33:18.750

Todd Doobrow: Listen to what other people are saying. Listen to what other people works jotting down lots of notes, and then following up after these calls and going back and saying, Hey, you know what's working? What do I like? What do they like.

223

00:33:18.940 --> 00:33:30.850

Todd Doobrow: and then even reaching out to a couple of you know, I've reached out to a couple of people, one on one, just to say, Hey, can you tell me a little bit more. Excuse me about what you've done about you know. How long did it take? What did you see from it? So

224

00:33:31.270 --> 00:33:34.010

Todd Doobrow: try. Just not a very I'm not a very big

225

00:33:34.050 --> 00:33:40.789

Todd Doobrow: public person. Usually, most of the time. I like to do a lot of my thinking behind the scenes and have more intentional meetings.

226

00:33:42.140 --> 00:33:43.340

Liz Hand, CFP®: And

227

00:33:44.510 --> 00:33:50.560

Liz Hand, CFP®: if we could play with that idea. what is dangerous about thinking and public

228

00:33:51.940 --> 00:33:59.690

Todd Doobrow: nothing. And what's ironic is, I do a ton of public speaking, and I always ask people to to ask questions. You know, I think just as humans.

229

00:33:59.920 --> 00:34:10.639

Todd Doobrow: you're not gonna be as as open in a in a public forum as you are on a one in a one. On



one conversation. I think that's just the way programmed.

230

00:34:12.699 --> 00:34:14.510

Liz Hand, CFP®: Are you open to a different perspective?

231

00:34:14.730 --> 00:34:16.050

Todd Doobrow: Sure, absolutely.

232

00:34:16.860 --> 00:34:26.790

Liz Hand, CFP®: That, perhaps, is your experience. And my guess is, it could be an opposite experience. It could be a varied experience for other people here.

233

00:34:27.350 --> 00:34:31.930

Liz Hand, CFP®: So for you, I hear when you're public speaking.

234

00:34:32.110 --> 00:34:41.290

Liz Hand, CFP®: and you're speaking your thoughts out loud. There, it feels good and confident, and there's a way here it doesn't have that same

235

00:34:41.730 --> 00:34:45.100

Liz Hand, CFP®: confidence or ease.

236

00:34:45.330 --> 00:34:59.570

Todd Doobrow: What do you distinguish? Does that land? First of all, I don't have to be right on that a little bit, you know. I think again, I think in in this group right now I'm still a rookie, so I'm just trying to sit down, shut up and figure out what works. And so there's

237

00:35:00.910 --> 00:35:05.969

Todd Doobrow: there. Believe it or not, I don't really like to talk. If I don't have anything important to add to the conversation.

238

00:35:06.150 --> 00:35:25.099

Todd Doobrow: So until I figure out how it all works and what does what and who is, you know who's who kinda in the game and how everyone fits together. I think it's best that I just sit back and relax for the time being when I'm the one on stage. I'm the subject matter expert, so I have plenty to add, because that's what I'm you know. That's what I'm there to do.

239

00:35:27.710 --> 00:35:31.660

Liz Hand, CFP®: I saw you nodding your head, Marianne, what did you hear in that that resonated for you?

240

00:35:32.770 --> 00:35:35.160

Marianne Nolte, CFP®: I



241

00:35:36.560 --> 00:35:42.500

Marianne Nolte, CFP®: Todd, because of your military background. I'm wondering if

242

00:35:42.540 --> 00:35:44.080

Marianne Nolte, CFP®: if that's

243

00:35:44.390 --> 00:35:47.840

Marianne Nolte, CFP®: I feel like I experience something similar in that.

244

00:35:48.020 --> 00:35:59.839

Marianne Nolte, CFP®: I know there's rules. I wanna follow the rules. And because they're there for a reason, and it creates consistency, and I get into limitless, and

245

00:35:59.850 --> 00:36:03.250

Marianne Nolte, CFP®: there are so many. Fill out this, fill out that.

246

00:36:03.450 --> 00:36:12.469

Marianne Nolte, CFP®: and they all drill back to a similar theme of Get your act together and know what your goals are.

247

00:36:12.660 --> 00:36:14.330

Marianne Nolte, CFP®: And I've

248

00:36:14.440 --> 00:36:36.229

Marianne Nolte, CFP®: I am struggling a little bit. With which of these forms. I should really be aggressive about like a lot of us have talked about fees already. On several of the calls, and yet we haven't gotten to the fee section of of limitless. And is it wrong of me to be now skipping forward to

249

00:36:36.240 --> 00:36:49.050

Marianne Nolte, CFP®: to processes? And do you guys want us to stay consistent with your schedule, or do you want us to run a lot? And I'm not really sure.

250

00:36:49.170 --> 00:36:58.180

Marianne Nolte, CFP®: because I'm a kindergartner, too. I don't know if I have your permission to.

251

00:36:59.350 --> 00:37:00.290

Liz Hand, CFP®: So what

252

00:37:00.550 --> 00:37:04.429

Liz Hand, CFP®: what has you both give me in this moment

253

00:37:06.220 --> 00:37:09.700



power the authority to make those decisions for you?

254

00:37:10.090 --> 00:37:11.459

Marianne Nolte, CFP®: I'm paying for it.

255

00:37:11.730 --> 00:37:12.660

Liz Hand, CFP®: Okay.

256

00:37:14.360 --> 00:37:15.220

Liz Hand, CFP®: what else?

257

00:37:16.380 --> 00:37:17.429

Marianne Nolte, CFP®: That's it.

258

00:37:17.590 --> 00:37:19.729

Liz Hand, CFP®: That's it. Just paying for it.

259

00:37:20.290 --> 00:37:22.109

Marianne Nolte, CFP®: I'm paying for guidance.

260

00:37:28.900 --> 00:37:32.230

Todd Doobrow: I'm I'm more interested in seeing what the end of the rainbow looks like.

261

00:37:34.010 --> 00:37:35.080

Liz Hand, CFP®: What does that mean?

262

00:37:36.140 --> 00:37:40.129

Todd Doobrow: What, again, what's what comes out of all this

263

00:37:40.460 --> 00:37:45.029

Todd Doobrow: in X, you know an X number of months or years, or whatever.

264

00:37:46.480 --> 00:37:52.220

Todd Doobrow: And and clearly you've been on this ride before, and I don't. I don't have a clue. You know what the next turn or twist is.

265

00:37:52.450 --> 00:37:53.150

Liz Hand, CFP®: Umhm.

266

00:37:54.020 --> 00:38:00.340

Liz Hand, CFP®: Yeah, it's such an interesting dance, and translates to the work that we do with clients. There's there's a way of knowing.



267

00:38:01.250 --> 00:38:04.060

Liz Hand, CFP®: And there's also a way of complete unknown.

268

00:38:04.510 --> 00:38:15.430

Liz Hand, CFP®: like my client. Base did one thing when I raised fees. Marin, your client base did another thing. and we can kind of hint at it. but also each of us have our own experience.

269

00:38:15.500 --> 00:38:22.560

Liz Hand, CFP®: And one thing I hear very strongly with both of your approach and expectation in this moment

270

00:38:22.650 --> 00:38:27.769

Liz Hand, CFP®: is like, what's the right way? What's the wrong way? Tell me now.

271

00:38:27.990 --> 00:38:29.210

Liz Hand, CFP®: because I paid for it.

272

00:38:30.870 --> 00:38:39.969

Todd Doobrow: It's not even with all due respect. It's not even that. It's just a matter of right now. I don't even know what I don't even know.

273

00:38:40.030 --> 00:38:45.670

Todd Doobrow: and just trying to figure out what all of our options are, what all is available.

274

00:38:45.710 --> 00:39:05.130

Todd Doobrow: you know. Marianne did it this way. I mean, I'm just looking over it over here. Bridget did it this way. Chris Wouldell does it that way. I mean, there's a million different ways that you can skin the cat. I'm just trying to, you know. I'm just trying to to learn from everyone else to figure out. Oh, that's the way that resonates the most with me and that's the way I'm gonna do it.

275

00:39:05.180 --> 00:39:12.260

Liz Hand, CFP®: and where does personal action come into that?

276

00:39:14.050 --> 00:39:31.230

Todd Doobrow: I just want I just wanna get a better understanding first. Right? It's hard. It's hard to even say I'll take action when that thing clicks and goes. Oh, yeah, this makes sense for you and and your clients. Let's try that a couple of times and see if it works. I'm I'm in the kind of the wet sponge. Just

277

00:39:31.310 --> 00:39:32.820

Todd Doobrow: drink it all upstage.

278

00:39:32.940 --> 00:39:34.169



Liz Hand, CFP®: and it feels good.

279

00:39:35.030 --> 00:39:40.819

Todd Doobrow: Yeah, I mean, of course, it's overwhelming. but it's it's a positive change. It's it's getting there.

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00:39:41.060 --> 00:39:44.629

Liz Hand, CFP®: Okay. so what's the part of it that doesn't feel good

281

00:39:46.380 --> 00:39:49.019

Todd Doobrow: again, the uncertainty and just trying to figure it all out.

282

00:39:49.230 --> 00:40:05.429

Todd Doobrow: you know, if if and I'm not saying I am this way. But, Liz, if you were to say, Here's the 10 step process to get your practice from where it is, to where you want it to be, and use this form for 2 weeks and fill it out. Use this form for 3 weeks, you know, if it was that cut and dry?

283

00:40:05.740 --> 00:40:22.779

Todd Doobrow: No question. Okay, great, you know. And and whether you implement all 10 steps or whatever, it wouldn't be a problem. But when it's just this much information, it's just ton of things, and all of them can work for the right people. It's just a matter of sorting through. And and personally.

284

00:40:22.820 --> 00:40:28.569

Todd Doobrow: maybe it's just me. I don't feel like my practice is a big mess right now. I mean, I I'm coming off my best year ever.

285

00:40:28.670 --> 00:40:43.990

Todd Doobrow: I've got a great assistant who is awesome and helps me with anything I need, you know, so I don't. I know some things need to be tweaked, but it's not like a massive overhaul. You know. I'm charging what I consider to be fair. My clients are happy. You know there's not a massive thing that

286

00:40:44.040 --> 00:40:46.730

Todd Doobrow: I'm coming into going, man, I gotta fix that.

287

00:40:47.190 --> 00:40:58.149

Todd Doobrow: So when you combine kind of that comfort level with all this information with all these insanely successful people on here, it just kind of takes a minute to

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00:40:58.360 --> 00:41:02.009

Todd Doobrow: figure out what it means for you, and and the way, you're doing things.

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00:41:03.270 --> 00:41:07.660

Liz Hand, CFP®: yeah.



290

00:41:08.850 --> 00:41:13.280

Liz Hand, CFP®: so both of you are waiting for me to give you the a BC, process

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00:41:13.430 --> 00:41:19.429

Todd Doobrow: no, no, I said, I said, if that was, then I said, if it was just an ABC.

292

00:41:19.450 --> 00:41:34.830

Todd Doobrow: No question. Everyone knows where they're going. But because this isn't right, this is limitless. This is free, this is flowing. This is this is, you get out of it whatever you want to get out of it. It just. It's just taking a minute more to go through to see what all the options are that's available.

293

00:41:35.230 --> 00:41:40.919

Todd Doobrow: and then use all those worksheets and thought patterns and everything to figure out where it is. We're trying to go

294

00:41:46.610 --> 00:41:49.799

Liz Hand, CFP®: for each of you. I'm curious. We can just take a moment here.

295

00:41:54.270 --> 00:41:55.380

Liz Hand, CFP®: What?

296

00:41:58.230 --> 00:42:01.159

Liz Hand, CFP®: What personal qualities come forth

297

00:42:02.330 --> 00:42:04.760

Liz Hand, CFP®: when you have choice.

298

00:42:09.730 --> 00:42:10.830

Todd Doobrow: Go ahead, Mary.

299

00:42:18.260 --> 00:42:21.360

Marianne Nolte, CFP®: Can you reframe that question?

300

00:42:26.540 --> 00:42:39.969

Liz Hand, CFP®: yeah. Well, actually, Todd, if something came up for you.

301

00:42:40.690 --> 00:42:44.380

Liz Hand, CFP®: I'll have you answer it, and then see if that helps shine a light. Marian.

302

00:42:44.450 --> 00:42:49.360

Todd Doobrow: Yeah, it's I'm very, very logical and rational.



303

00:42:49.660 --> 00:43:03.360

Todd Doobrow: It don't let a whole lot of emotion comes into come into big decisions like that. Now again, when you're dealing with clients, there's an emotional piece that does come in, and that's fine. But but when someone says, Hey, here's an idea.

304

00:43:03.540 --> 00:43:05.720

Todd Doobrow: Are you gonna do it? Yes or no.

305

00:43:05.800 --> 00:43:18.429

Todd Doobrow: internally and very quickly my mind makes that procon list, and I'm running down which one, you know, which one outweighs. Which one is this a good idea for me and mine? And is this gonna help? And is it worth it, and all that fun stuff.

306

00:43:19.120 --> 00:43:22.900

Liz Hand, CFP®: So then your brain, your brain is on overdrive once you're given

307

00:43:22.980 --> 00:43:27.889

Liz Hand, CFP®: choice, because you have got to optimize the whole thing, and come up with the answer for yourself.

308

00:43:31.380 --> 00:43:34.490

Liz Hand, CFP®: What happens for you when you have choice, Marianne?

309

00:43:35.140 --> 00:43:43.209

Marianne Nolte, CFP®: li feel in a very similar way, and and that overdrive is actually it feels good, because that's when I'm having fun

310

00:43:43.560 --> 00:43:53.449

Marianne Nolte, CFP®: is when I get to problem solve of. So I like that. I like that something comes my way. I have to

311

00:43:53.510 --> 00:43:57.499

Marianne Nolte, CFP®: do my pros and cons and battle through it.

312

00:43:58.070 --> 00:44:06.340

Marianne Nolte, CFP®: That that's what I'm here to do as an advisor. I like to hang up messes.

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00:44:06.770 --> 00:44:17.729

Liz Hand, CFP®: Yeah, I have it that there's that is what makes an advisor and advisor like the ability to problem, solve and optimize. And all of that, and there are times where it feels really good, and I have it that

314

00:44:18.270 --> 00:44:22.810



Liz Hand, CFP®: overwhelm sets in. Then, when it's like, Well, there's these, all of these choices.

315

00:44:23.130 --> 00:44:26.590

Liz Hand, CFP®: Then you have to optimize all of those things. So

316

00:44:27.760 --> 00:44:29.210

Liz Hand, CFP®: what do you want?

317

00:44:34.860 --> 00:44:38.970

Marianne Nolte, CFP®: I want to be efficient. I want to.

318

00:44:39.160 --> 00:44:48.340

Marianne Nolte, CFP®: So I have created my clarity of what I'm after. I do want to sell my business in 7 years and retire.

319

00:44:48.520 --> 00:44:50.459

Marianne Nolte, CFP®: and when I

320

00:44:50.540 --> 00:44:54.240

Marianne Nolte, CFP®: look at selling my business. I

321

00:44:54.990 --> 00:45:00.630

Marianne Nolte, CFP®: take personal pride in knowing that I'm selling something that's organized quality

322

00:45:00.860 --> 00:45:04.100

Marianne Nolte, CFP®: and in alignment with what that next person needs.

323

00:45:04.330 --> 00:45:16.009

Marianne Nolte, CFP®: So I like to problem solve. I just like to know that I'm doing the right thing to set myself up for what's gonna happen in 7 years?

324

00:45:16.670 --> 00:45:31.180

Marianne Nolte, CFP®: Why, 7 years, because I'm an Almighty, and it's time for me to retire in 7 years. So okay, I live at the lake, and I'm ready to retire in 7 years. Is that a better answer?

325

00:45:32.620 --> 00:45:42.390

Marianne Nolte, CFP®: Yeah, I love my business. I love what I've created in a very short period of time. I had a different business that totally unrelated. I

326

00:45:42.500 --> 00:45:51.020

Marianne Nolte, CFP®: did it for 30 years. I that's not just. It's my personality to be self employed. I'm in my happy place like that.



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00:45:51.040 --> 00:45:54.040

Marianne Nolte, CFP®: But and I love this industry.

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00:45:54.060 --> 00:46:02.960

Marianne Nolte, CFP®: So now I just want to create this perfect little world of imagine financial services and then turn around and be able to sell it.

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00:46:03.130 --> 00:46:06.689

Marianne Nolte, CFP®: And and know that, I'm selling something of quality

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00:46:06.970 --> 00:46:09.510

Liz Hand, CFP®: bye bye.

331

00:46:15.170 --> 00:46:16.140

Liz Hand, CFP®: so

332

00:46:17.900 --> 00:46:24.699

Liz Hand, CFP®: you're given a bunch of choice here at limelis. And I actually, I think I've distilled out that these are 2

333

00:46:24.750 --> 00:46:25.760

Liz Hand, CFP®: separate

334

00:46:26.120 --> 00:46:38.550

Liz Hand, CFP®: places that your concerns are coming from, though they kind of surfaced similarly at the top. And

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00:46:42.330 --> 00:46:43.819

Liz Hand, CFP®: so for Mary Ann.

336

00:46:45.350 --> 00:46:49.679

Liz Hand, CFP®: What if there's no wrong way

337

00:46:50.210 --> 00:46:51.250

Liz Hand, CFP®: of doing it?

338

00:46:52.920 --> 00:46:55.889

Liz Hand, CFP®: What if? What if right and wrong has nothing to do with it.

339

00:46:57.000 --> 00:47:06.289

Marianne Nolte, CFP®: I'm okay with that. And I'm seeing that. And that's why I'm going ahead and



forging forward on steps that are. You haven't introduced yet.

340

00:47:06.530 --> 00:47:09.870

Marianne Nolte, CFP®: but I'm I'm also just that personality that

341

00:47:09.880 --> 00:47:21.239

Marianne Nolte, CFP®: I would prefer to get. That list of. These are the steps. and it hasn't come to me that way. So I'm putting my toe in the tub and going okay, I'm just gonna venture off and do it.

342

00:47:21.290 --> 00:47:32.730

Marianne Nolte, CFP®: So I think that that's the emotion that it evokes which made me put down a 2 ish leaning toward a 3 ish is that I'm just. I wasn't expecting to be

343

00:47:32.800 --> 00:47:51.919

Marianne Nolte, CFP®: emotionally involved in this. I thought this was just going to be check the box, and I'd get through, and then I'd be better at this at the end of the year, and it's more of a feeling thing. And I'm just that's not my comfort zone or my happy place. So that's what makes me uncomfortable, I said it set it out loud.

344

00:47:53.300 --> 00:48:03.619

Liz Hand, CFP®: and as you dipped your toe and you took the action, and you did the thing that you didn't think would necessarily come the way that it did. What did you learn about yourself?

345

00:48:07.140 --> 00:48:09.930

Marianne Nolte, CFP®: and

346

00:48:11.870 --> 00:48:12.740

Marianne Nolte, CFP®: we're not.

347

00:48:13.820 --> 00:48:16.300

Marianne Nolte, CFP®: I edit myself even more. Now.

348

00:48:18.650 --> 00:48:24.760

Marianne Nolte, CFP®: It sent an email to limitless. And in the subject line it said frustrated.

349

00:48:24.780 --> 00:48:30.230

Marianne Nolte, CFP®: And immediately I got a barrage of emails back, saying. Oh, my gosh!

350

00:48:30.510 --> 00:48:47.290

Marianne Nolte, CFP®: Why are you frustrated? What's going on. Obviously, it's not just this minor issue, and it really was kind of a minor issue, and it was the choice of the word frustrated that set off an alarm at limitless. And so I went back to grammarly and

351



00:48:47.350 --> 00:48:59.809

Marianne Nolte, CFP®: corrected my response email to let us know that everything's okay. And I didn't mean it one way, but that further makes me know that I need to edit my mouth.

352

00:48:59.930 --> 00:49:02.249

Marianne Nolte, CFP®: And certainly in writing.

353

00:49:04.250 --> 00:49:15.669

Marianne Nolte, CFP®: that's that's the learning from dipping your toe into uncertainty. Yeah, I'm not the softest person around, and I sometimes say things that I should probably be thinking through a little bit better.

354

00:49:16.420 --> 00:49:21.270

Liz Hand, CFP®: Are you open to a different perspective on that sure.

355

00:49:21.280 --> 00:49:23.829

Marianne Nolte, CFP®: just people will always have

356

00:49:24.570 --> 00:49:27.589

Liz Hand, CFP®: as someone who is always editing.

357

00:49:27.850 --> 00:49:41.959

Liz Hand, CFP®: always monitoring the emotion, the feel, the I've had to train myself. But even the the longer that I edit, the more that effort that I put into it, it still doesn't matter, because everybody gets their experience of you.

358

00:49:42.300 --> 00:49:44.710

Liz Hand, CFP®: You get to trip the wire.

359

00:49:45.650 --> 00:49:47.909

Liz Hand, CFP®: Everybody gets their experience with you.

360

00:49:49.130 --> 00:49:51.420

Liz Hand, CFP®: So you come out and you stay frustrated.

361

00:49:51.860 --> 00:49:59.849

Liz Hand, CFP®: Everybody interprets, interprets, frustrated differently based on their own past experiences. They'll delete distort

362

00:50:00.000 --> 00:50:02.780

Liz Hand, CFP®: the words that you say. and

363

00:50:03.000 --> 00:50:07.150



Liz Hand, CFP®: anything can be cleaned up with an inside relationship.

364

00:50:07.700 --> 00:50:16.000

Todd Doobrow: Oh, sounds like, you guys interpreted this way. Actually, I'm fine. Just so, you know, I'm fine. I just need this.

365

00:50:17.480 --> 00:50:19.139

Liz Hand, CFP®: What are you hearing that for yourself?

366

00:50:21.020 --> 00:50:34.340

Marianne Nolte, CFP®: okay, okay, Ill get what you're saying. It's, you know, it's like, don't put it in text, because everybody in interprets in a different way. Pick up the phone and have the conversation, and don't be so afraid.

367

00:50:34.530 --> 00:50:37.480

Liz Hand, CFP®: Oh, I actually never said, Don't put it in text.

368

00:50:37.830 --> 00:50:45.160

Marianne Nolte, CFP®: No, but that's that's what I read into it. Yeah.

369

00:50:45.330 --> 00:50:46.450

Marianne Nolte, CFP®: assisted.

370

00:50:46.730 --> 00:50:50.690

Liz Hand, CFP®: yeah. And this is a space where you get to just be.

371

00:50:52.370 --> 00:50:54.570

Liz Hand, CFP®: you get to be

372

00:50:54.610 --> 00:51:05.860

Liz Hand, CFP®: doing really well. Todd. not really finding a lot of places where there's improvement and soaking in information. And my my

373

00:51:07.550 --> 00:51:14.260

Liz Hand, CFP®: My curiosity there is. Where can you? Where can you allow yourself to stand up and talk

374

00:51:14.350 --> 00:51:17.149

Liz Hand, CFP®: verses, sit down and shut up and listen

375

00:51:17.380 --> 00:51:20.060

Liz Hand, CFP®: like, how can you expand that part of your freedom?

376



00:51:22.190 --> 00:51:25.969

Liz Hand, CFP®: And what would that give you in other areas of your life that you are seeking.

377

00:51:26.700 --> 00:51:35.310

Todd Doobrow: Yeah, I mean, again, we're, I think we're kind of talking about 2 different things at least in my mind, and you know one is a zoom call with 150 people on it, and one is.

378

00:51:35.320 --> 00:51:47.240

Todd Doobrow: you know, my assistant, and you know my back office and my marketing person and all that. So you know a again, I'm just trying to sit here and figure out what I need from limitless

379

00:51:47.380 --> 00:51:57.200

Todd Doobrow: and then and then it. It's back to the smaller meetings with the people who are a little bit more intimate with my team and my clients, and how it works to say, Hey.

380

00:51:57.270 --> 00:52:11.129

Todd Doobrow: hey, guys, I was on a call, and I don't. I'm looking at Josh Hargrove. I see your name there, man. So you know this work for Josh Hargrove and his team. What would you think it would work for us in ours? And then we have that conversation, you know, I don't necessarily think that

381

00:52:11.230 --> 00:52:22.449

Todd Doobrow: this is the place to have that conversation, because most of us here don't know each other. You know we don't know how we work. We don't know what we like or what we don't like. So again, I'm just. I'm just trying to absorb it all in right now.

382

00:52:23.010 --> 00:52:23.690

Liz Hand, CFP®: Umhm.

383

00:52:24.020 --> 00:52:24.700

thank you.

384

00:52:25.480 --> 00:52:29.839

Liz Hand, CFP®: I've never participated in the army or any

385

00:52:30.040 --> 00:52:31.710

Liz Hand, CFP®: variation of that. But

386

00:52:31.740 --> 00:52:39.420

Liz Hand, CFP®: what struck me is the way that in that area it is, take orders and do the thing.

387

00:52:39.740 --> 00:52:44.819

Todd Doobrow: And what I am hearing in you is so much clarity about what it is that you want.

388



00:52:45.040 --> 00:52:48.669

Liz Hand, CFP®: And so approaching this programme from the same place, that you might

389

00:52:49.510 --> 00:52:59.930

Todd Doobrow: make no mistake. When I was a kid I was told to take order. Sit down and shut up. Sorry. My my 4 looking business partner might come. Say, Hi,

390

00:53:00.130 --> 00:53:01.210

Todd Doobrow: You know.

391

00:53:01.300 --> 00:53:16.849

Todd Doobrow: as a kid your question, you know you're taught never to ask and never to talk and never ask why. as a professional, I think we always ask why? And we always ask, Is that right? Or why are we doing this or whatever. I just think the forums in which you do it are a little bit different.

392

00:53:17.050 --> 00:53:17.750

Liz Hand, CFP®: Umhm.

393

00:53:19.150 --> 00:53:23.980

Liz Hand, CFP®: So what's the boldest thing you could just ask. That's been on your mind. But you haven't been willing to.

394

00:53:25.260 --> 00:53:38.889

Todd Doobrow: What's the most beneficial thing that anyone on this call has done through this program right, and if I'm sure if I went through all, however, many people on the call, I would get that many different answers. I just think it's interesting to see what

395

00:53:39.010 --> 00:53:51.000

Todd Doobrow: you know. Are people bogged down with operational issues? Are people bogged down with charging fees? Are people bogged down with the prospect process. You know, I mean, it's going to be different for everyone. That's why, I, just like, I just like to hear stories.

396

00:53:51.220 --> 00:53:53.410

Liz Hand, CFP®: cool

397

00:53:54.200 --> 00:54:05.629

Liz Hand, CFP®: all, right, thank you for participating in this. I'm going to leave you here so we can switch to the other 2. I would love as we take Marianne and Todd off of spotlight

398

00:54:05.660 --> 00:54:10.369

Liz Hand, CFP®: for those of you who heard something for yourself that was new. Can you put it in the chat?

399

00:54:27.890 --> 00:54:29.580



Liz Hand, CFP®: Sorry. I'm trying to find here

400

00:54:32.820 --> 00:54:35.010

Liz Hand, CFP®: agency of time. Super valuable

401

00:54:37.100 --> 00:54:39.730

Liz Hand, CFP®: raising fees and setting minimums gives you more time.

402

00:54:43.140 --> 00:54:45.740

Liz Hand, CFP®: As you have other learnings, you can pop it there.

403

00:54:45.900 --> 00:54:50.720

Liz Hand, CFP®: No such thing as multitasking.

404

00:54:54.670 --> 00:54:55.420

Liz Hand, CFP®: yeah.

405

00:54:57.700 --> 00:55:00.659

Liz Hand, CFP®: all right, I'm going to PIN Laura

406

00:55:02.250 --> 00:55:08.100

Liz Hand, CFP®: or spotlight, Laura. And where's the shopping

407

00:55:11.820 --> 00:55:13.440

Liz Hand, CFP®: Roshani? Are you still there?

408

00:55:15.780 --> 00:55:20.530

Liz Hand, CFP®: She is still hairless, sorry, cool, alright

409

00:55:20.860 --> 00:55:22.010

Liz Hand, CFP®: popped up.

410

00:55:22.020 --> 00:55:26.510

Liz Hand, CFP®: Add to spotlight. Poor. Very good.

411

00:55:28.120 --> 00:55:30.310

Liz Hand, CFP®: Okay. Let me see what you guys have said.

412

00:55:37.900 --> 00:55:52.879

Liz Hand, CFP®: So increase fees double. How will it be received, Laura. one extreme to another. knowing you need to surge, knowing that you didn't need to get rid of clients. What I hear in both of these is



413

00:55:54.030 --> 00:55:57.830

Liz Hand, CFP®: how you will be perceived, or the expectations of other people.

414

00:56:00.780 --> 00:56:01.880

Laura Chanin: Yes.

415

00:56:02.250 --> 00:56:03.490

Liz Hand, CFP®: what?

416

00:56:05.110 --> 00:56:07.080

Liz Hand, CFP®: What might be true about you

417

00:56:07.390 --> 00:56:11.070

Liz Hand, CFP®: both? Either of you can answer this question, what might be true about you

418

00:56:12.620 --> 00:56:14.130

Liz Hand, CFP®: if some one gets upset

419

00:56:17.550 --> 00:56:18.660

Laura Chanin: at me.

420

00:56:19.660 --> 00:56:21.419

Laura Chanin: I don't really like it.

421

00:56:22.690 --> 00:56:24.270

Liz Hand, CFP®: Okay, how come?

422

00:56:26.440 --> 00:56:30.539

Laura Chanin: I? Well, I wrote down here

423

00:56:30.980 --> 00:56:34.769

Laura Chanin: like. I like people to think highly of me. I like.

424

00:56:35.160 --> 00:56:39.449

Laura Chanin: I like to be liked. I think that's part of who I am.

425

00:56:39.760 --> 00:56:44.490

Laura Chanin: I don't like it if they would think poorly of me.

426

00:56:47.380 --> 00:56:48.689



Liz Hand, CFP®: What kind of person

427

00:56:50.340 --> 00:56:52.610

Liz Hand, CFP®: would you be if they didn't like you?

428

00:57:02.080 --> 00:57:06.030

Laura Chanin: Well, if I if I liked them? And they didn't like me.

429

00:57:07.990 --> 00:57:08.670

yes.

430

00:57:10.070 --> 00:57:11.720

Laura Chanin: maybe bitchy

431

00:57:11.920 --> 00:57:12.960

Laura Chanin: a bitch.

432

00:57:13.250 --> 00:57:14.780

Laura Chanin: Not a nice person.

433

00:57:15.090 --> 00:57:15.750

Umhm.

434

00:57:15.940 --> 00:57:17.469

Laura Chanin: not a good person.

435

00:57:17.980 --> 00:57:19.710

Liz Hand, CFP®: What happens to bitchy people?

436

00:57:26.490 --> 00:57:32.579

Laura Chanin: it's nothing really like.

437

00:57:33.500 --> 00:57:38.229

Laura Chanin: I don't know. I think if you go like deeper, I think it's like I'm scared. I'll be alone

438

00:57:38.360 --> 00:57:40.489

Laura Chanin: if I go down.

439

00:57:41.020 --> 00:57:42.310

Liz Hand, CFP®: Great awareness on that.

440



00:57:45.890 --> 00:57:48.020

Liz Hand, CFP®: And what's hard about being alone for you?

441

00:57:51.340 --> 00:57:54.040

Laura Chanin: I'm I'm in my therapy session here. List.

442

00:57:54.130 --> 00:58:06.610

Laura Chanin: I don't. I don't actually know because I like being by myself, but I think if I go to my deepest fear, and you know it's like I'm I just don't want to be alone, like

443

00:58:06.670 --> 00:58:19.840

Laura Chanin: I want people to think well of me and know that there's people around me, that love Me and it's scary to be thought of alone. how will I fight off the saber-toothed tigers. If i'm by myself.

444

00:58:20.180 --> 00:58:23.919

Liz Hand, CFP®: how about you rashanni.

445

00:58:25.050 --> 00:58:29.459

Liz Hand, CFP®: what do you fear might happen if somebody reacts poorly to you? Raising your fees.

446

00:58:31.020 --> 00:58:42.270

Roshani Pandey: Yeah. I think I will feel like I am failing. My business is failing. you know. I should be going in this direction and going in this direction.

447

00:58:42.490 --> 00:58:47.210

Roshani Pandey: That's first thought that comes to my mind. Is that not going the right direction?

448

00:58:48.170 --> 00:58:50.519

Liz Hand, CFP®: And what kind of person has a business fail?

449

00:58:52.560 --> 00:59:02.309

Roshani Pandey: Hmm! Somebody who's not capable of having a business or somebody was not capable in their field.

450

00:59:05.350 --> 00:59:10.180

Liz Hand, CFP®: And when you see someone who's incapable in their field.

451

00:59:11.350 --> 00:59:12.930

Liz Hand, CFP®: what do you see happen to them.

452

00:59:15.320 --> 00:59:16.270

Roshani Pandey: Hmm!



453

00:59:17.450 --> 00:59:23.979

Roshani Pandey: They just see more and bigger and bigger failures. And everybody is like, Wow! You're such a failure.

454

00:59:24.130 --> 00:59:27.480

Roshani Pandey: you know. Everybody starts looking down on them.

455

00:59:31.190 --> 00:59:32.640

Liz Hand, CFP®: And then what happens

456

00:59:35.710 --> 00:59:38.670

Roshani Pandey: then? Just the person shrinks.

457

00:59:39.090 --> 00:59:47.160

Roshani Pandey: Yeah, it's like, you know, getting fired by someone right like getting fired again and again. It's like, you're just

458

00:59:47.730 --> 00:59:57.540

Roshani Pandey: like your. It's not like all your biggest fears are actually out. It's all realized, you know. It's out in the open thing.

459

00:59:59.890 --> 01:00:02.690

Roshani Pandey: All your nightmares are becoming a reality.

460

01:00:02.820 --> 01:00:03.770

Liz Hand, CFP®: Yeah.

461

01:00:05.260 --> 01:00:07.430

Liz Hand, CFP®: And what's hard for you about shrinking?

462

01:00:09.860 --> 01:00:11.620

Roshani Pandey: It's hard.

463

01:00:13.220 --> 01:00:25.670

Roshani Pandey: it's just I, you know, it's like that shouldn't happen to me. You know I feel like there's so much. and not to sound arrogant or anything. But I feel like there's so much that I'm capable of

464

01:00:25.820 --> 01:00:32.140

Roshani Pandey: that. If I don't. you know, just by my actions or inactions.

465

01:00:33.440 --> 01:00:38.080

Roshani Pandey: if they are, if they don't, if they're not become a reality.



466

01:00:38.180 --> 01:00:46.660

Roshani Pandey: it's my personal failure towards myself because I'm actually I have so many gifts that I have been given by nature.

467

01:00:47.190 --> 01:00:47.950

Roshani Pandey: Yeah.

468

01:00:48.450 --> 01:00:49.170

Liz Hand, CFP®: Umhm.

469

01:00:54.310 --> 01:00:58.220

Liz Hand, CFP®: What do you hear in each other's shares?

470

01:01:04.350 --> 01:01:06.009

Laura Chanin: Anything for yourself.

471

01:01:07.850 --> 01:01:12.610

Laura Chanin: I think that we're a little bit hard on ourselves and judging ourselves, too, much

472

01:01:12.930 --> 01:01:16.290

Laura Chanin: like Roshani, said, she has

473

01:01:16.330 --> 01:01:20.600

Laura Chanin: gifts and attributes and strengths, and it's like, Well.

474

01:01:21.110 --> 01:01:23.670

Laura Chanin: Taking risks

475

01:01:23.820 --> 01:01:29.049

Laura Chanin: is like what successful people do, and I'm sure you're very successful, and so

476

01:01:29.990 --> 01:01:36.150

Laura Chanin: I don't. I don't know why that it sounded to me like she was kind of hard on herself. So I'm imagining that that sounds like what I'm to.

477

01:01:42.460 --> 01:01:50.809

Roshani Pandey: Yeah. I felt like when I heard Laura say. You know, if they they get, they get upset and they leave. You know I'm gonna be alone. I thought that was

478

01:01:50.980 --> 01:01:56.680

Roshani Pandey: a lot of projecting, which is something that I think we all do you know.



479

01:01:56.810 --> 01:01:58.410

Roshani Pandey: myself included?

480

01:01:59.930 --> 01:02:00.670

Roshani Pandey: Yeah.

481

01:02:02.740 --> 01:02:07.739

Liz Hand, CFP®: And take that the next step. So she's doing a lot of projecting. Therefore, what?

482

01:02:08.170 --> 01:02:12.370

Liz Hand, CFP®: What's the truth? What's the hitch? What? What else is there?

483

01:02:13.450 --> 01:02:28.009

Roshani Pandey: Yeah, I think it's it's a lot of the those stories keep repeating in our heads. You know, we have a story. and we just use these scenarios to as evidence of that. Those stories being true.

484

01:02:28.610 --> 01:02:29.660

Roshani Pandey: you know, like.

485

01:02:29.800 --> 01:02:40.769

Roshani Pandey: I mean, I'm just taking this as an example. I don't know how you know if this is the truth or not, Laura, but you know this might be like, well, people leave me people once they get to know me, they they leave.

486

01:02:41.040 --> 01:02:49.460

Roshani Pandey: You know that kind of a story, or it could be the values again. You know I'm not worth not good enough. This is like some kind of a mask I have, and

487

01:02:49.510 --> 01:02:50.780

Roshani Pandey: people will

488

01:02:51.040 --> 01:03:00.290

Roshani Pandey: will see the person behind who is not really that great and you know, once they see that, then they cannot unsee that. And

489

01:03:00.520 --> 01:03:08.649

Roshani Pandey: you know, that will just lead to a spiral down. Yeah, so yeah, it's it's all of those stories that we keep repeating in our heads.

490

01:03:11.010 --> 01:03:12.910

Liz Hand, CFP®: How did that land, Laura?



491

01:03:15.950 --> 01:03:21.949

Laura Chanin: Well, part of me thinks that's true and part of me think so. This is so ridiculous. I can't believe, I think this.

492

01:03:22.000 --> 01:03:26.209

Liz Hand, CFP®: which again, I guess, is judging myself. Yeah, it's like 2 levels of judgment.

493

01:03:26.400 --> 01:03:33.469

Laura Chanin: Yes, exactly. And there is a part of me that would actually be excited to

494

01:03:33.890 --> 01:03:36.750

Laura Chanin: I think it's called right size your client base.

495

01:03:37.200 --> 01:03:40.990

Laura Chanin: But maybe for me, I just need to do it in baby steps, like, just

496

01:03:41.160 --> 01:03:45.620

Laura Chanin: like I don't know 5 clients at a time rather than ripping the whole band date off

497

01:03:45.660 --> 01:03:47.650

Laura Chanin: just to see how it goes.

498

01:03:47.800 --> 01:03:51.270

Liz Hand, CFP®: Umhm. Yeah. there's

499

01:03:51.590 --> 01:03:59.399

Liz Hand, CFP®: different ways of approaching it. Of course some people do just want to rip the Band-aid off and see what happens. And also there's

500

01:03:59.670 --> 01:04:01.379

Liz Hand, CFP®: giving yourself the space.

501

01:04:01.990 --> 01:04:06.170

Liz Hand, CFP®: There's logic, too, in in giving the space and doing it in tranches, too.

502

01:04:06.490 --> 01:04:14.109

Liz Hand, CFP®: So if this has nothing to do with being alone, Laura.

503

01:04:14.180 --> 01:04:18.160

Liz Hand, CFP®: and if this has nothing to do with failure, Brashoni.

504



01:04:18.930 --> 01:04:20.970
Liz Hand, CFP®: what's your highest commitment?

505

01:04:27.400 --> 01:04:32.920
Laura Chanin: Well, my highest commitment would be to my family, and I want to have a successful business that.

506

01:04:33.490 --> 01:04:40.540
Laura Chanin: you know supports all of us. and, you know, makes money so we can do all the activities and things that we want

507

01:04:41.100 --> 01:04:50.320
Laura Chanin: and runs a successful, efficient practice. So it's great for the clients, you know, great for my staff, like everybody, prospers. And there's abundance.

508

01:04:51.320 --> 01:04:53.270
Laura Chanin: So that is what i'm committed to

509

01:04:54.130 --> 01:05:02.310
Liz Hand, CFP®: and when you come from that place of every one prospers. And there is abundance.

510

01:05:04.530 --> 01:05:05.710
Liz Hand, CFP®: What do you see?

511

01:05:07.110 --> 01:05:10.639
Laura Chanin: Well, then, it actually seems like an easy decision. It's like, okay.

512

01:05:11.050 --> 01:05:14.989
Laura Chanin: having this section of smaller clients that

513

01:05:15.060 --> 01:05:29.419
Laura Chanin: doesn't even cover our basic costs doesn't support that. And it's like, I guess it kind of shifts me from feeling emotional about it to be more logical and rational. And then it's like, Okay, it's like an easy decision.

514

01:05:29.460 --> 01:05:35.229
Laura Chanin: Laura. I just have to. I'm still a little bit scared about how to do it. But I think that's the right thing to do.

515

01:05:37.370 --> 01:05:38.160
Liz Hand, CFP®: Yeah.

516

01:05:39.200 --> 01:05:40.909



Liz Hand, CFP®: So what's your action from there?

517

01:05:44.840 --> 01:05:49.450

Laura Chanin: think about how to do it.

518

01:05:49.780 --> 01:06:00.500

Laura Chanin: And you know, maybe like, look on tribe, or see if there's suggestions people have about like how how you word it and tell clients your

519

01:06:01.240 --> 01:06:12.380

Laura Chanin: moving on in a nice way that it's not the right fit anymore. I'm sure there's nice ways to do. I just don't know how to try to look for that. Maybe people on this call will share with me some ideas on that.

520

01:06:12.500 --> 01:06:19.500

Laura Chanin: If I if I had a way to do it, or ideas of the nice way to do it, then that would

521

01:06:19.850 --> 01:06:25.010

Laura Chanin: make me feel a lot better about it, I guess. Maybe that's what's scary, too, is like, I don't really know how to do it.

522

01:06:25.060 --> 01:06:27.309

Laura Chanin: I wanna do it eloquently.

523

01:06:28.720 --> 01:06:40.169

Roshani Pandey: Yeah, yeah, you know, what makes it harder is that like, when I talk to this group, you know this, I mean, you know, lives. And and you know, Steph and all of these people right? Like, you guys.

524

01:06:40.210 --> 01:07:06.200

Roshani Pandey: you know, make me think like, okay, I have to take big, bold risks. And I have to. You know whatever I think I have to take those big steps. But when that when I talk to other people in my life, we're also running a successful business, and you know, I think a very experience do when I talk to them. And when I talk about doubling fees they're like. Oh, better be careful, you know, like you better have a really good reason. Really good story for why you're raising your fees.

525

01:07:06.240 --> 01:07:32.089

Roshani Pandey: because, you know, people will will say, oh, she's doubling her fees. Oh, my gosh! Like, you know, they'll they'll start rethinking about your services. So so it's that like when when I come out of these calls. I'm like, yes, I'm gonna do it. I'm gonna do all of these things. When I talk to other people in my life. You know other, these, these mentors and stuff. It's it's that kind of a thing. And it's like, who do. I listen to sometimes, you know.

526

01:07:32.260 --> 01:07:47.920

Roshani Pandey: and and and I think, like I have done my best when I have taken big, bold risks, and I



have. Then I haven't like bent over to anybody else's demands. That's when I have succeeded the most. There is that evidence.

527

01:07:48.080 --> 01:07:55.569

Roshani Pandey: But at the same time I'm also like these people are so seasoned they have so much experience like, am I really gonna completely discount

528

01:07:55.920 --> 01:08:12.240

Roshani Pandey: their advice as well, and just go with mine? And what is the consequence of doing that like, what if I lose this one client who's been one of my best clients? And I'm thinking of not just increasing the fees. I'm thinking of doubling the fees on them, and I know, you know, but

529

01:08:12.520 --> 01:08:20.269

Roshani Pandey: but still, like just the the idea of doubling right? Anything doubling is just like a big thing. So it's it's that kind of a thing for me.

530

01:08:20.810 --> 01:08:25.629

Liz Hand, CFP®: Umhm. Yeah, I have it just with the number of times you've used the word double

531

01:08:25.689 --> 01:08:28.590

Liz Hand, CFP®: that that's a hook for you.

532

01:08:30.810 --> 01:08:34.190

Liz Hand, CFP®: and how many things do we pay for that? Have doubled in cost?

533

01:08:34.740 --> 01:08:43.849

Liz Hand, CFP®: Lots of things, but for some reason that feels extra heavy for you. So I just wanted to reflect that as a point of awareness,

534

01:08:43.920 --> 01:08:50.449

Liz Hand, CFP®: What's the risk in listening to yourself as you take in the information from mentors and limitless.

535

01:08:52.069 --> 01:08:58.120

Roshani Pandey: What's the risk in listing to myself? if I'm wrong. that's the risk.

536

01:08:58.600 --> 01:09:01.369

Liz Hand, CFP®: And what if it has nothing to do with right wrong.

537

01:09:04.689 --> 01:09:05.750

Roshani Pandey: Hmm!

538

01:09:09.130 --> 01:09:11.389



Roshani Pandey: What if it has nothing to do, right or wrong?

539

01:09:11.609 --> 01:09:20.620

Roshani Pandey: yeah, it's I think it's it's just. and maybe it's not trusting myself, you know

540

01:09:20.880 --> 01:09:27.679

Roshani Pandey: it's probably what it is like. If it's if it's yeah. If it had nothing to do with right or wrong, then it is a matter of trust.

541

01:09:29.420 --> 01:09:30.859

Liz Hand, CFP®: How do you want to remember that?

542

01:09:32.779 --> 01:09:36.460

Roshani Pandey: How do I want to remember that What

543

01:09:37.500 --> 01:09:38.919

Liz Hand, CFP®: it's a matter of trust.

544

01:09:39.200 --> 01:09:46.280

Liz Hand, CFP®: like, how do you want to integrate that into that next moment. Where you're saying the thing and someone's like, I don't know. If you should do that.

545

01:09:46.439 --> 01:09:50.540

Roshani Pandey: then it might be limitless, saying, I don't know if you should do that.

546

01:09:50.689 --> 01:09:58.090

Liz Hand, CFP®: but you have the idea externally from a different source. How do you want to remember and come back to trust.

547

01:09:58.430 --> 01:10:00.289

Roshani Pandey: Trust yourself. Kind of a thing.

548

01:10:00.610 --> 01:10:14.179

Roshani Pandey: I think. I think. You know the I think the the 5 steps thing you guys had talked about right, the the catch and correct using that so I think that's a good way to

549

01:10:14.260 --> 01:10:15.949

Roshani Pandey: think about it like, what's

550

01:10:16.300 --> 01:10:26.890

Roshani Pandey: why? Am I? Because every time you you face that kind of a confusion. There is something happening in your mind. It's not like, you know, smooth sailing. There is some kind of a confusion going on



551
01:10:27.030 --> 01:10:27.960
Roshani Pandey: so.

552
01:10:28.220 --> 01:10:33.099
Roshani Pandey: But I think that's a good moment to be like, okay, what's happening? Why am I thinking like this.

553
01:10:33.160 --> 01:10:45.379
Roshani Pandey: you know? Why do I really need somebody to say yes, yes, that's the right thing, you know. Why can't I just say. you know, I'm gonna trust myself and do what I think is right, as opposed to asking other people for their

554
01:10:45.830 --> 01:10:48.100
Roshani Pandey: their approval.

555
01:10:48.250 --> 01:10:49.110
Roshani Pandey: Yeah.

556
01:10:50.750 --> 01:10:51.530
Liz Hand, CFP®: yeah.

557
01:10:51.950 --> 01:11:10.679
Liz Hand, CFP®: just an idea for both of you, as you think about these 2 concepts for Laura. Everyone prospers. There's abundance for Rashani. Trust myself finding a visual way to capture that as well, and put it in your space, whether that's sticky. Note. If you want to be just really simple and effective

558
01:11:10.830 --> 01:11:23.419
Liz Hand, CFP®: with it. Or if you want to put that in some other creative way of being in your space or on your body, or, you know, tattoos just kidding. I mean, you can't. But

559
01:11:25.970 --> 01:11:31.830
Liz Hand, CFP®: finding ways just to ground yourself in that knowledge.

560
01:11:33.480 --> 01:11:36.369
Liz Hand, CFP®: because notice how what you said Rashani was

561
01:11:36.380 --> 01:11:45.880
Liz Hand, CFP®: when I get into that space where I'm like, wait, is this what I'm supposed to do is right wrong. There's a spinning that happens. And even Todd was referencing that spinning

562
01:11:45.950 --> 01:11:49.619
Liz Hand, CFP®: that feeling, he he referenced it as overwhelmed.



563

01:11:50.830 --> 01:11:52.570

Liz Hand, CFP®: There's a lack of clarity.

564

01:11:53.630 --> 01:12:01.730

Liz Hand, CFP®: and for sometimes just coming back to our knowing of like, I'm trusting myself in this. I'm making this decision. Perhaps some of it is.

565

01:12:01.830 --> 01:12:06.969

Liz Hand, CFP®: This is Ok. This is me just taking in a bunch of information. This is me discovering what I want.

566

01:12:07.290 --> 01:12:17.760

Liz Hand, CFP®: And that's me asserting. Now, Todd, if you're still on the line. A place where, just cutting through the overwhelm and getting to this is fine. This is okay.

567

01:12:18.220 --> 01:12:27.419

Liz Hand, CFP®: This feels uncertain, because there's just a bunch of information that I'm getting. But I'm exploring, I'm discovering. and I'll know when I get to the thing that I want.

568

01:12:28.220 --> 01:12:30.409

Liz Hand, CFP®: Just notice how the the

569

01:12:30.430 --> 01:12:35.510

Liz Hand, CFP®: the isness of that feels differently than getting caught in the emotion. Laura

570

01:12:35.730 --> 01:12:37.740

Laura Chanin: definitely

571

01:12:38.990 --> 01:12:40.069

Liz Hand, CFP®: was that helpful.

572

01:12:40.340 --> 01:12:41.500

Roshani Pandey: very.

573

01:12:41.610 --> 01:12:43.490

Laura Chanin: yes, thank you, great

574

01:12:44.580 --> 01:12:50.130

Liz Hand, CFP®: alright. So for those listening. What learning for yourself

575

01:12:51.230 --> 01:12:54.880



Liz Hand, CFP®: did you have in that moment, as we were talking with

576

01:12:55.140 --> 01:12:56.360

Liz Hand, CFP®: Rashawn and Laura.

577

01:12:57.960 --> 01:12:59.740

Liz Hand, CFP®: I'm checking through

578

01:13:01.150 --> 01:13:02.530

Liz Hand, CFP®: the messages.

579

01:13:07.230 --> 01:13:08.100

Liz Hand, CFP®: Okay.

580

01:13:09.650 --> 01:13:11.629

Liz Hand, CFP®: you're welcome to pop those there.

581

01:13:13.240 --> 01:13:17.729

Liz Hand, CFP®: and if there's somebody who wants to be, we still have time here.

582

01:13:18.040 --> 01:13:23.550

Liz Hand, CFP®: Somebody wants to just be coached, one to one happy to entertain that right now.

583

01:13:24.470 --> 01:13:28.869

Liz Hand, CFP®: whereas a place that you feel stuck can be personal, professional. It can be anywhere of life.

584

01:13:32.240 --> 01:13:34.149

Liz Hand, CFP®: What would give you the most momentum

585

01:13:35.120 --> 01:13:37.299

Liz Hand, CFP®: if you solved this thing.

586

01:13:47.270 --> 01:13:54.060

Liz Hand, CFP®: and if you're that person sitting there thinking, maybe me, I don't know. What has you not just reach out and grab it.

587

01:13:55.420 --> 01:13:56.680

Liz Hand, CFP®: What has he? Wait?

588

01:13:57.750 --> 01:14:01.439

Liz Hand, CFP®: These are all areas of reflection of your mind set.



589

01:14:03.830 --> 01:14:05.679

Liz Hand, CFP®: Do you not want to take up the spotlight?

590

01:14:06.620 --> 01:14:10.129

Liz Hand, CFP®: I don't want to take it from other people is that I don't want to look dumb.

591

01:14:12.100 --> 01:14:14.559

Liz Hand, CFP®: Take what you want. get what you want.

592

01:14:18.090 --> 01:14:18.889

Liz Hand, CFP®: Who's up?

593

01:14:53.140 --> 01:14:55.420

Liz Hand, CFP®: You'll find I'm very comfortable with silence.

594

01:14:59.650 --> 01:15:04.639

Liz Hand, CFP®: and I have it that there is some one here that is just right on the edge of getting supported.

595

01:15:06.070 --> 01:15:07.250

Liz Hand, CFP®: Now's your time.

596

01:15:18.030 --> 01:15:19.590

Bridget Borel, The Pearl Financial Planning: I'll jump in was

597

01:15:19.850 --> 01:15:22.030

Bridget Borel, The Pearl Financial Planning: speaking.

598

01:15:22.340 --> 01:15:28.759

Bridget Borel, The Pearl Financial Planning: This is Bridget. Hi! I'll just say I

599

01:15:29.540 --> 01:15:30.420

Bridget Borel, The Pearl Financial Planning: So

600

01:15:30.720 --> 01:15:46.980

Bridget Borel, The Pearl Financial Planning: Several years ago I was going through a divorce, and my mom died in the same year, and that prompted a lot of personal work I've done with myself. So I actually find the mindset piece here.

601

01:15:47.580 --> 01:15:52.670

Bridget Borel, The Pearl Financial Planning: I don't know if easy is the right word, but I've I've done a lot



of the work already.

602

01:15:52.750 --> 01:16:03.199

Bridget Borel, The Pearl Financial Planning: So a lot of it's kind of like reminders for me. But where I'm I'm going to be the one feeling super vulnerable. Because I just started my own firm

603

01:16:03.410 --> 01:16:07.370

Bridget Borel, The Pearl Financial Planning: in November. So

604

01:16:07.840 --> 01:16:19.969

Bridget Borel, The Pearl Financial Planning: you know, getting into the model practice. and all of the business metrics is where I'm like, So

605

01:16:20.040 --> 01:16:30.100

Bridget Borel, The Pearl Financial Planning: you know, I'm I'm super grateful for those who stepped up and and shared because I'm sure that was not easy or comfortable. So

606

01:16:31.720 --> 01:16:33.890

Bridget Borel, The Pearl Financial Planning: thank you.

607

01:16:33.930 --> 01:16:40.739

Bridget Borel, The Pearl Financial Planning: But I think you know. I'm trying to apply the mindset lessons to the places where I am

608

01:16:41.110 --> 01:16:52.020

Bridget Borel, The Pearl Financial Planning: kind of having that. And I, you know definitely at the beginning there was that feeling of overwhelming like, Oh, my gosh! There's so much I don't know where to start, and just taking a step back and be like, okay.

609

01:16:52.480 --> 01:16:55.770

Bridget Borel, The Pearl Financial Planning: let's take one piece. Let's go. So.

610

01:16:56.100 --> 01:17:01.180

Bridget Borel, The Pearl Financial Planning: Schmidt. throw that in there. Thank you absolutely.

611

01:17:02.070 --> 01:17:07.340

Liz Hand, CFP®: Do you? Wanna look at the model practice business metrics piece

612

01:17:07.710 --> 01:17:11.650

Bridget Borel, The Pearl Financial Planning: as part of your mindset? We can. Sure.

613

01:17:12.120 --> 01:17:14.770

Liz Hand, CFP®: What's the outcome you'd like from having this conversation.



614

01:17:15.470 --> 01:17:18.470

Bridget Borel, The Pearl Financial Planning: Let's see.

615

01:17:23.800 --> 01:17:28.329

Bridget Borel, The Pearl Financial Planning: maybe. And this is probably along the lines of what

616

01:17:28.360 --> 01:17:31.040

Todd and, Marian we're talking about is

617

01:17:31.360 --> 01:17:34.330

Bridget Borel, The Pearl Financial Planning: feeling like, I want some kind of certainty of like.

618

01:17:34.560 --> 01:17:38.690

Bridget Borel, The Pearl Financial Planning: okay, like, where am I even starting like thinking about.

619

01:17:39.210 --> 01:17:40.969

Bridget Borel, The Pearl Financial Planning: how big do I? Wanna be?

620

01:17:45.100 --> 01:17:47.799

Bridget Borel, The Pearl Financial Planning: I feel like I'm kind of throwing darts.

621

01:17:48.400 --> 01:17:49.590

Bridget Borel, The Pearl Financial Planning: Adam. Wall.

622

01:17:49.900 --> 01:17:52.899

Bridget Borel, The Pearl Financial Planning: And trying to answer that.

623

01:17:53.670 --> 01:18:00.889

Bridget Borel, The Pearl Financial Planning: you know I have. I have some ideas. I just I don't know how correct they are.

624

01:18:01.160 --> 01:18:03.410

Bridget Borel, The Pearl Financial Planning: correct for whom?

625

01:18:04.690 --> 01:18:08.020

Bridget Borel, The Pearl Financial Planning: For me, or if it's realistic.

626

01:18:08.350 --> 01:18:17.659

Bridget Borel, The Pearl Financial Planning: given that I'm just starting And you know I'm not starting from 0. I brought clients with me.



627

01:18:17.680 --> 01:18:23.490

Bridget Borel, The Pearl Financial Planning: but yeah. So maybe that feeling of

628

01:18:23.940 --> 01:18:26.839

Bridget Borel, The Pearl Financial Planning: not even certainty, but wanting to know if I'm like

629

01:18:27.030 --> 01:18:28.739

Bridget Borel, The Pearl Financial Planning: in range

630

01:18:29.100 --> 01:18:30.430

Bridget Borel, The Pearl Financial Planning: if that makes sense.

631

01:18:30.630 --> 01:18:31.460

Liz Hand, CFP®: Umhm.

632

01:18:33.220 --> 01:18:35.720

Liz Hand, CFP®: quick story

633

01:18:36.580 --> 01:18:44.989

Liz Hand, CFP®: not a swifty but recently have been caught in the in the Taylor Swift rabbit Hole.

634

01:18:45.510 --> 01:18:48.400

Liz Hand, CFP®: learned that she, at age 11,

635

01:18:48.810 --> 01:18:49.570

Liz Hand, CFP®: took

636

01:18:50.100 --> 01:18:58.729

Liz Hand, CFP®: little CD's recordings of herself, seen Karaoke to country music, recording studios just to try to get a deal.

637

01:19:00.340 --> 01:19:01.220

Liz Hand, CFP®: So.

638

01:19:01.980 --> 01:19:06.169

Liz Hand, CFP®: my son, he's 9. He's got all these big ambitions.

639

01:19:07.540 --> 01:19:13.390

Liz Hand, CFP®: and he wrote down a goal that he has which is to make a million dollars by age 12.

640

01:19:18.460 --> 01:19:21.060



Liz Hand, CFP®: I bring those 2 things in. Because

641

01:19:21.900 --> 01:19:26.550

Liz Hand, CFP®: what's correct? What's realistic? What's in range? I have no idea.

642

01:19:29.730 --> 01:19:41.630

Liz Hand, CFP®: If I would have imposed that my feeling of like, no way on Taylor Swift. If I was her mother huh! Squashed like you would not see the Billionaire to day.

643

01:19:44.160 --> 01:19:45.130

Liz Hand, CFP®: So

644

01:19:45.630 --> 01:19:47.440

Liz Hand, CFP®: what do you want Bridget?

645

01:19:47.560 --> 01:19:52.000

Bridget Borel, The Pearl Financial Planning: Yeah, I'm hearing you say it. Say that. And I'm thinking

646

01:19:52.870 --> 01:19:55.560

Bridget Borel, The Pearl Financial Planning: when he said, if you spot it, you got it

647

01:19:57.270 --> 01:20:04.209

Bridget Borel, The Pearl Financial Planning: where? You know, I said in the chat earlier, that just pick something and go. And I think that's

648

01:20:04.440 --> 01:20:07.999

Bridget Borel, The Pearl Financial Planning: kind of what I need to do to a certain extent with the

649

01:20:08.810 --> 01:20:16.719

Bridget Borel, The Pearl Financial Planning: the model practice metrics and not be so hard on myself and just

650

01:20:16.770 --> 01:20:19.769

Bridget Borel, The Pearl Financial Planning: work on taking action in in those directions.

651

01:20:22.450 --> 01:20:30.780

Bridget Borel, The Pearl Financial Planning: I just what I want is to not, and this is something I've struggled with in the past. I want to not

652

01:20:32.100 --> 01:20:38.859

Bridget Borel, The Pearl Financial Planning: be stuck or paralyzed out of some fear of

653



01:20:39.980 --> 01:20:41.250

Bridget Borel, The Pearl Financial Planning: whatever

654

01:20:41.930 --> 01:20:46.750

Bridget Borel, The Pearl Financial Planning: you know. Imposter syndrome feeling unworthy.

655

01:20:48.390 --> 01:20:53.170

Bridget Borel, The Pearl Financial Planning: feeling like I'm not experienced enough, etc., like I know.

656

01:20:54.390 --> 01:20:57.559

Bridget Borel, The Pearl Financial Planning: I know I can do this. There's a large part of me. It's like

657

01:20:57.770 --> 01:21:02.119

Bridget Borel, The Pearl Financial Planning: I can do this, and I can have a killer firm.

658

01:21:02.680 --> 01:21:07.560

Bridget Borel, The Pearl Financial Planning: I just have to execute. And I want my

659

01:21:09.510 --> 01:21:14.120

Bridget Borel, The Pearl Financial Planning: whatever self limitations I've had in the past to not

660

01:21:14.430 --> 01:21:15.549

Bridget Borel, The Pearl Financial Planning: get in my way.

661

01:21:16.980 --> 01:21:19.430

Bridget Borel, The Pearl Financial Planning: That's what I want to not get in my own way.

662

01:21:19.790 --> 01:21:20.610

Liz Hand, CFP®: Yeah.

663

01:21:21.610 --> 01:21:25.179

Liz Hand, CFP®: what part of you feels paralyzed with your

664

01:21:25.460 --> 01:21:27.900

Liz Hand, CFP®: model practice and business metrics.

665

01:21:27.910 --> 01:21:33.589

Liz Hand, CFP®: And when I say, what part of you I actually mean physically like, where does it? Where does paralyzed sit.

666

01:21:36.540 --> 01:21:38.200

Bridget Borel, The Pearl Financial Planning: I would take my upper back.



667

01:21:38.760 --> 01:21:40.449

Liz Hand, CFP®: Yeah, I kind of like

668

01:21:41.050 --> 01:21:44.209

Bridget Borel, The Pearl Financial Planning: shoulders tensing up, maybe.

669

01:21:45.680 --> 01:21:49.009

Liz Hand, CFP®: How aware are you when that feeling comes into play?

670

01:21:50.070 --> 01:21:52.550

Bridget Borel, The Pearl Financial Planning: It's huh?

671

01:21:54.050 --> 01:21:59.769

Bridget Borel, The Pearl Financial Planning: Fairly aware now. Because it's something I've worked on for a while.

672

01:22:00.980 --> 01:22:11.210

Bridget Borel, The Pearl Financial Planning: but I think in the past I wasn't aware of it until it was like that kind of spinning feeling. You're referenced

673

01:22:11.280 --> 01:22:12.840

Liz Hand, CFP®: so it accompanies that

674

01:22:13.290 --> 01:22:16.570

Bridget Borel, The Pearl Financial Planning: but like that's a more

675

01:22:17.520 --> 01:22:19.310

Bridget Borel, The Pearl Financial Planning: exaggerated for

676

01:22:20.960 --> 01:22:29.100

Liz Hand, CFP®: so it starts if I'm understanding correctly, it starts in your shoulder back area very tense and then gets to the spinning overwhelm.

677

01:22:30.140 --> 01:22:30.960

Liz Hand, CFP®: Okay.

678

01:22:31.140 --> 01:22:34.530

Liz Hand, CFP®: what do you want to do to remind yourself

679

01:22:35.230 --> 01:22:41.400

Liz Hand, CFP®: to pick something. because you're going to have a killer firm, and all you need to do is



execute.

680

01:22:44.130 --> 01:22:51.460

Bridget Borel, The Pearl Financial Planning: well, I like the like post that's and signs

681

01:22:51.550 --> 01:22:53.499

Bridget Borel, The Pearl Financial Planning: and I've done some of those.

682

01:22:53.670 --> 01:22:56.089

Bridget Borel, The Pearl Financial Planning: I have it.

683

01:22:57.150 --> 01:23:09.209

Bridget Borel, The Pearl Financial Planning: I haven't specifically done them with the the metrics, so I could do that And I shared in the good vibes tribe a message my daughter had

684

01:23:10.110 --> 01:23:14.680

Bridget Borel, The Pearl Financial Planning: sent me. Let me get a little emotional

685

01:23:14.870 --> 01:23:16.399

but I think like

686

01:23:17.410 --> 01:23:25.130

Bridget Borel, The Pearl Financial Planning: looking at that every day like. you know, making a reminder on my phone or something to look at it. And and

687

01:23:25.180 --> 01:23:28.280

Bridget Borel, The Pearl Financial Planning: would be helpful.

688

01:23:29.200 --> 01:23:31.510

Liz Hand, CFP®: What's the emotion?

689

01:23:32.100 --> 01:23:33.240

Bridget Borel, The Pearl Financial Planning: Whoo!

690

01:23:38.570 --> 01:23:41.750

Bridget Borel, The Pearl Financial Planning: So my daughter's 21,

691

01:23:42.700 --> 01:23:43.820

Bridget Borel, The Pearl Financial Planning: and

692

01:23:45.320 --> 01:23:50.430

Bridget Borel, The Pearl Financial Planning: you know, and I have 2 boys. So I want all of my kids to



693

01:23:50.500 --> 01:23:55.690

Bridget Borel, The Pearl Financial Planning: 16 didn't do well and like reach their potential. But

694

01:23:56.700 --> 01:24:00.649

Bridget Borel, The Pearl Financial Planning: thing as a woman like having been told

695

01:24:01.170 --> 01:24:03.940

Bridget Borel, The Pearl Financial Planning: as a child like you

696

01:24:04.080 --> 01:24:04.760

Bridget Borel, The Pearl Financial Planning: have

697

01:24:05.150 --> 01:24:13.249

Bridget Borel, The Pearl Financial Planning: certain career limitations placed on you because you should be able to follow has been around. That's where I think

698

01:24:13.350 --> 01:24:17.729

Bridget Borel, The Pearl Financial Planning: and then living that as a navy wife for a while.

699

01:24:18.120 --> 01:24:26.629

Bridget Borel, The Pearl Financial Planning: and you know, kind of putting it on myself, that self limitation. I just wanna make sure that I model for her

700

01:24:26.910 --> 01:24:27.720

Bridget Borel, The Pearl Financial Planning: that

701

01:24:28.560 --> 01:24:31.690

Bridget Borel, The Pearl Financial Planning: she can do whatever the heck she wants to do.

702

01:24:32.080 --> 01:24:33.959

Bridget Borel, The Pearl Financial Planning: and she just has to go for it.

703

01:24:34.150 --> 01:24:37.430

Liz Hand, CFP®: yeah.

704

01:24:38.390 --> 01:24:45.300

Liz Hand, CFP®: what's the quality that's embodied in that like, you can do you can choose whatever you want just go for it.

705

01:24:45.440 --> 01:24:49.980

Bridget Borel, The Pearl Financial Planning: kind of like we were talking earlier about



706
01:24:50.310 --> 01:24:51.760
Bridget Borel, The Pearl Financial Planning: trusting ourselves.

707
01:24:51.940 --> 01:24:52.610
Liz Hand, CFP®: Hmm!

708
01:24:55.780 --> 01:24:56.710
Liz Hand, CFP®: Clap up.

709
01:24:57.810 --> 01:25:01.390
Liz Hand, CFP®: So that's another area that you can capture that learning.

710
01:25:02.040 --> 01:25:10.769
Liz Hand, CFP®: Notice that that emotion that came out pointed you right back to trust yourself and so that's the big learning for you there

711
01:25:12.530 --> 01:25:13.390
Liz Hand, CFP®: hubble

712
01:25:13.610 --> 01:25:17.510
Bridget Borel, The Pearl Financial Planning: yeah, thank you, you're welcome first.

713
01:25:17.890 --> 01:25:24.999
Liz Hand, CFP®: Great. Anybody has some learnings that they want to share in the tribe or in the chat. Go for it.

714
01:25:25.170 --> 01:25:29.289
Liz Hand, CFP®: and we have 13 luxurious minutes

715
01:25:29.410 --> 01:25:33.730
Liz Hand, CFP®: remaining. and I would love to coach whomever would like to get supported.

716
01:25:36.240 --> 01:25:36.980
Bye, bye.

717
01:25:47.700 --> 01:25:51.429
Dawn Gordon: let us all chime in dawn, Gordon from Las Vegas

718
01:25:51.560 --> 01:25:53.469
Liz Hand, CFP®: cool Hi Dawn.



719

01:25:54.010 --> 01:26:05.930

Dawn Gordon: Hi. so similar to Bridget. I've done a lot of personal development over the years. I have a mature practice

720

01:26:06.380 --> 01:26:07.600

Dawn Gordon: and

721

01:26:08.760 --> 01:26:13.500

Dawn Gordon: the model. The model practice is a little bit of a challenge.

722

01:26:13.540 --> 01:26:23.690

Dawn Gordon: because I feel like I wanna wind down and my mind is in

723

01:26:23.860 --> 01:26:26.840

Dawn Gordon: conflict with.

724

01:26:27.390 --> 01:26:34.209

Dawn Gordon: I'm at the peak of my career. I have great skills and talents that I've spent years building

725

01:26:34.590 --> 01:26:50.339

Dawn Gordon: financially. I don't have to work. I love what I do. I love the value that I provide my clients. I'm not because that's what I all I want to do in a day.

726

01:26:50.360 --> 01:26:57.169

Dawn Gordon: There's an entire type underneath. There's some entitlement that I have that I shouldn't have to

727

01:26:57.200 --> 01:27:00.640

Dawn Gordon: do other things. But just leave my clients.

728

01:27:00.830 --> 01:27:05.460

Dawn Gordon: and I don't seem to be able to attract the right. Who's

729

01:27:06.250 --> 01:27:17.490

Dawn Gordon: And then I just want to have fun. Right? I mean, I'm I'm I'm a rainmaker. I'm a leader to my clients, and the rest of this stuff is

730

01:27:17.600 --> 01:27:23.739

Dawn Gordon: difficult for me. I don't have a lot of patience for training which

731

01:27:25.920 --> 01:27:27.570

Dawn Gordon: I want to hire



732

01:27:27.790 --> 01:27:37.610

Dawn Gordon: team members that are already experienced that could read my mind. You know that program. Where's that program? So?

733

01:27:37.820 --> 01:27:53.179

Dawn Gordon: And then, at the same time, in the background, my Lincoln financial securities. My broker dealer has been sold to another broker dealer, and there's a lot of things going on with that, and a key employee who's also my boyfriend

734

01:27:53.200 --> 01:27:59.089

Dawn Gordon: is leaving and breaking up with me, and so there's a lot of

735

01:27:59.150 --> 01:28:09.290

Dawn Gordon: like opportunity. But also there's that rumbling of fear, but I already know I can do this because I've I've been doing it for a long time.

736

01:28:09.480 --> 01:28:22.920

Dawn Gordon: So there's a little bit of overwhelm. But then I go back to what I know which is serving my clients, and then my days. Great. But then there's the reality. When am I going to get off my own hamster wheel.

737

01:28:23.010 --> 01:28:31.779

Dawn Gordon: So, Liz, I know I gave you a lot, and I've listened to you. So I know that you follow very well.

738

01:28:32.330 --> 01:28:39.580

Liz Hand, CFP®: Yeah. What do you think would give you the biggest shift to day to look at amongst those items?

739

01:28:42.130 --> 01:28:45.719

Dawn Gordon: Some some level of a balance between

740

01:28:46.950 --> 01:29:04.299

Dawn Gordon: the self care of the grief that I'm going through. I mean, there's a lot of change happening at the same time with the loss of what I've known, not only in my day to day with the business with the broker dealer change cause. There's a lot going on there.

741

01:29:04.300 --> 01:29:24.459

Dawn Gordon: I've been with the same broker dealer for 27 years. I didn't initiate the change. They they did right. We saw it. It'll be a great thing, no matter what, but there's there'll be some short term pain, and then the the change with my key employee and significant other leaving.

742

01:29:24.720 --> 01:29:29.450



Dawn Gordon: All of that has a lot of emotion around it.

743

01:29:30.580 --> 01:29:34.430

Dawn Gordon: so the most impactful would be how to

744

01:29:35.450 --> 01:29:39.819

Dawn Gordon: stay. Stay. Stay on track. But I'm not sure which track.

745

01:29:40.330 --> 01:29:41.150

Liz Hand, CFP®: Hmm.

746

01:29:43.120 --> 01:29:43.910

Liz Hand, CFP®: yeah.

747

01:29:45.970 --> 01:29:50.359

Liz Hand, CFP®: was the if you don't mind me asking.

748

01:29:50.530 --> 01:29:52.649

Liz Hand, CFP®: and you don't have to respond either.

749

01:29:52.680 --> 01:29:54.650

Liz Hand, CFP®: Was the

750

01:29:55.070 --> 01:30:00.060

Liz Hand, CFP®: significant other key employee, leaving at your decision or their decision.

751

01:30:00.150 --> 01:30:01.400

Liz Hand, CFP®: I don't see all

752

01:30:01.580 --> 01:30:07.459

Liz Hand, CFP®: essentially 3 major decisions without your your consent. Initiation correct and

753

01:30:07.570 --> 01:30:20.460

Dawn Gordon: that, the key employee doesn't care for how I execute my business. And so there's there's been a rub for a little little while,

754

01:30:20.750 --> 01:30:22.660

Dawn Gordon: and

755

01:30:25.050 --> 01:30:30.179

Dawn Gordon: good, bad, or different. That's just the way that they they don't care how I



756

01:30:30.300 --> 01:30:35.610

Dawn Gordon: make make business decisions. And I'm I'm very successful.

757

01:30:35.630 --> 01:30:41.499

Dawn Gordon: But their their their style is different than mine.

758

01:30:41.680 --> 01:30:52.309

Dawn Gordon: and we do different roles. I'm the ringmaker, financial advisor and their operations and service. So, correct, I didn't ask for any of it

759

01:30:52.450 --> 01:30:59.599

Liz Hand, CFP®: I, just I just wanna have fun and do my job all day. I mean, I think I'm normal.

760

01:31:00.820 --> 01:31:04.950

Liz Hand, CFP®: Are you feeling anger?

761

01:31:06.440 --> 01:31:21.140

Dawn Gordon: disappointed and disappointed. I know that's not really appealing. But it is appealing.

762

01:31:21.170 --> 01:31:23.540

Dawn Gordon: Okay, okay,

763

01:31:25.130 --> 01:31:55.100

Dawn Gordon: sad that that that I mean on the, on the, on the business side, losing a key employee. There's a little, you know, there's fear, right? Because I have been interdependent on a key employee for a while, and we've we've grown together. The position has been developed over time. I didn't have this position when when he started. And now I do. I have this full time. I'm highly dependent. The business highly dependent on

764

01:31:55.270 --> 01:31:56.790

Dawn Gordon: that role.

765

01:31:57.310 --> 01:32:13.250

Dawn Gordon: so there's little bit of fear of how am I going to be supported while I do my job at the level that that I want to execute, which is providing that leadership.

766

01:32:13.950 --> 01:32:18.429

Dawn Gordon: seamlessly. You know. Front stage front, you know.

767

01:32:18.600 --> 01:32:19.490

Liz Hand, CFP®: Umhm.

768



01:32:21.000 --> 01:32:26.759

Liz Hand, CFP®: yeah, I have it. Just my experience of this interaction is the way that you are very

769

01:32:26.870 --> 01:32:30.260

Liz Hand, CFP®: thoughtful in the way that you

770

01:32:30.850 --> 01:32:33.220

Liz Hand, CFP®: think about things that are happening to you.

771

01:32:33.870 --> 01:32:39.159

Liz Hand, CFP®: and I see disappointment as like a holding tank that's really uncomfortable.

772

01:32:40.220 --> 01:32:49.540

Liz Hand, CFP®: And inside, tucked in with disappointment or some of these other fears or other feelings like sadness and fear. Yes.

773

01:32:50.790 --> 01:32:56.260

Liz Hand, CFP®: I'm curious how come not pissed off. How come not angry that your beady

774

01:32:56.980 --> 01:33:23.730

Dawn Gordon: just basically upset the apple cart, for you know I'm actually very happy about. I'm I think it's so exciting, and I think there's opportunity. But there will be change. There will be. There'll be bumps in the road, I mean 27 well, longer than 27 years in the business. So that I'm not. I'm not concerned about that will ultimately

775

01:33:23.760 --> 01:33:26.809

Dawn Gordon: be amazing, no matter which way.

776

01:33:26.830 --> 01:33:29.849

Liz Hand, CFP®: Okay, so you're really connected to the possibility of that.

777

01:33:30.140 --> 01:33:42.680

Dawn Gordon: Absolutely. I'm I'm excited with everything that I have been exposed to so far, no matter what direction there will be there will be change, and I'm I'm looking forward to it.

778

01:33:42.900 --> 01:33:46.949

Liz Hand, CFP®: Okay? So disappointed

779

01:33:47.220 --> 01:33:48.700

Liz Hand, CFP®: sadness. Fear.

780

01:33:49.080 --> 01:33:55.440

Liz Hand, CFP®: how come not pissed off, angry at key employee.



781

01:33:57.220 --> 01:34:00.690

Dawn Gordon: I guess, because it's not the first time

782

01:34:01.470 --> 01:34:04.380

Dawn Gordon: the employee has tried to

783

01:34:05.690 --> 01:34:09.370

Dawn Gordon: take themselves away. And so there's been some

784

01:34:09.550 --> 01:34:16.690

Dawn Gordon: training for that lack of a better word.

785

01:34:17.320 --> 01:34:20.500

Dawn Gordon: this, this this sadness is that

786

01:34:21.900 --> 01:34:27.440

Dawn Gordon: I guess I'm I'm loose. I'm losing someone that I really cared about. And

787

01:34:27.830 --> 01:34:31.360

Dawn Gordon: The instability

788

01:34:34.280 --> 01:34:36.200

Dawn Gordon: is scary a little bit.

789

01:34:38.060 --> 01:34:49.439

Dawn Gordon: and I already feel overwhelmed. Right I already feel in my day to day job and then the broker dealer thing added another layer of complexity.

790

01:34:49.710 --> 01:34:56.490

Dawn Gordon: and then this is like. how am I gonna do? How am I gonna do it all, you know, and who can help me? And

791

01:34:56.510 --> 01:35:09.329

Dawn Gordon: I do have 2 other team members. So I'm not completely alone. But they're not at the skill level or knowledge level or support level. That that the other person is. And so

792

01:35:09.670 --> 01:35:11.390

Dawn Gordon: there's that's the

793

01:35:13.960 --> 01:35:17.799

Dawn Gordon: that's what makes me get tears in my eyes like, how am I going to do it all.



794

01:35:18.310 --> 01:35:19.150

Liz Hand, CFP®: Hmm.

795

01:35:24.630 --> 01:35:25.980

Liz Hand, CFP®: yeah, that's heavy.

796

01:35:31.940 --> 01:35:34.349

Liz Hand, CFP®: How so? One

797

01:35:35.140 --> 01:35:40.020

Liz Hand, CFP®: in service of that feeling? That's a that's a hard place to be in.

798

01:35:40.280 --> 01:35:44.070

Liz Hand, CFP®: And when we resist an emotion it persists.

799

01:35:44.890 --> 01:35:50.110

Liz Hand, CFP®: So how can you create spaciousness for yourself to feel all the feelings?

800

01:35:50.570 --> 01:35:53.709

Liz Hand, CFP®: And we keep saying the key employee

801

01:35:53.890 --> 01:35:59.140

Liz Hand, CFP®: and recognizing that it's your significant other. It's your boyfriend also.

802

01:35:59.310 --> 01:36:00.200

Dawn Gordon: Yes.

803

01:36:00.350 --> 01:36:03.910

Liz Hand, CFP®: and so that's so multifaceted and layered.

804

01:36:04.140 --> 01:36:05.070

Dawn Gordon: Yes.

805

01:36:07.700 --> 01:36:11.329

Liz Hand, CFP®: how and how you want to create space for yourself to feel

806

01:36:11.520 --> 01:36:13.170

Liz Hand, CFP®: through all of that

807

01:36:16.440 --> 01:36:22.160



Dawn Gordon: I don't know, because my go to, probably like a lot of people. Liz is to be in service.

808

01:36:22.220 --> 01:36:28.390

Dawn Gordon: so I don't feel it. You know. It's a winning formula. Just to get get back to

809

01:36:28.550 --> 01:36:32.250

Dawn Gordon: get back to what I know and that makes me feel good.

810

01:36:32.360 --> 01:36:37.359

Liz Hand, CFP®: I don't wanna wallow, I wanna be in action.

811

01:36:38.600 --> 01:36:46.830

Liz Hand, CFP®: And if I, if I may reflect what I'm hearing in that is, there's a bit of willpower like, okay, this is hard. I'm going to will myself over it

812

01:36:46.930 --> 01:36:54.510

Liz Hand, CFP®: and get back into action, and I feel really good there, I know that's a good, safe place. It comes with a cost.

813

01:36:57.550 --> 01:36:59.129

Liz Hand, CFP®: What's the cost for you?

814

01:37:04.770 --> 01:37:10.930

Dawn Gordon: Well, it's a level of anxiety, and stress on my body

815

01:37:11.130 --> 01:37:17.890

Liz Hand, CFP®: And what's predictable for it to come out as it's showing anxiety and stress on your body.

816

01:37:20.940 --> 01:37:22.230

Dawn Gordon: Tiredness

817

01:37:26.230 --> 01:37:34.360

Dawn Gordon: kind of the opposite of who I am. A kind of dim. It dims it dims my my brightness. I don't, I don't. I'm not.

818

01:37:34.900 --> 01:37:38.840

Dawn Gordon: I'm not in my intuition and able to hear, and

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01:37:39.270 --> 01:37:42.139

Dawn Gordon: so it it covers me over of

820



01:37:42.190 --> 01:37:44.920
Dawn Gordon: who I really am. It makes me

821
01:37:46.340 --> 01:37:49.450
Dawn Gordon: like less. Vivacious, I guess.

822
01:37:50.770 --> 01:37:58.770
Liz Hand, CFP®: Yeah, I'm very present to your vivaciousness the vibrancy of it. I'm very present to your vibrancy, your vivaciousness.

823
01:37:58.920 --> 01:38:01.210
Liz Hand, CFP®: I can see hints of it coming out.

824
01:38:01.380 --> 01:38:05.309
Liz Hand, CFP®: And what if you access that through

825
01:38:05.460 --> 01:38:06.969
Liz Hand, CFP®: feeling the feelings

826
01:38:08.280 --> 01:38:11.170
Dawn Gordon: I don't understand? I don't understand the question.

827
01:38:11.620 --> 01:38:18.559
Liz Hand, CFP®: So instead of willpower going over it and experiencing the tiredness, the dimming, the brightness, not in your intuition.

828
01:38:19.510 --> 01:38:20.510
Liz Hand, CFP®: What if

829
01:38:21.740 --> 01:38:28.790
Liz Hand, CFP®: what if there is discovery that you can find that vivaciousness

830
01:38:30.350 --> 01:38:34.970
Liz Hand, CFP®: While going through the sadness and the fear

831
01:38:36.470 --> 01:38:37.940
Liz Hand, CFP®: instead of overriding it.

832
01:38:39.630 --> 01:38:45.639
Dawn Gordon: They it doesn't. They seem like 2 different 2 totally different things. They do not seem.

833
01:38:45.770 --> 01:38:49.919



Liz Hand, CFP®: Okay. Yeah, I can't answer the question.

834

01:38:50.040 --> 01:38:57.849

Liz Hand, CFP®: Oh, that's fine. And also for just play with that idea, like, what is the possibility? Or where have I seen it work for me or some one else?

835

01:38:57.910 --> 01:39:03.079

Liz Hand, CFP®: Is this possible as to not have to deal with the anxiety and stress of my body.

836

01:39:05.700 --> 01:39:07.880

Dawn Gordon: So ask me the question again.

837

01:39:08.160 --> 01:39:13.770

Liz Hand, CFP®: Yeah, it's it was worded it was muddled. So how can I shorten it?

838

01:39:14.850 --> 01:39:17.740

Liz Hand, CFP®: How can you access your vivaciousness.

839

01:39:19.960 --> 01:39:22.110

Liz Hand, CFP®: I guess that's the shortest way of asking it.

840

01:39:25.730 --> 01:39:27.799

Dawn Gordon: Well, I think you were asking me.

841

01:39:28.080 --> 01:39:34.250

Dawn Gordon: really, how how do I sync into the yucky feelings not override them.

842

01:39:34.440 --> 01:39:35.200

Liz Hand, CFP®: Yep.

843

01:39:37.010 --> 01:39:38.080

Liz Hand, CFP®: 3. Yeah.

844

01:39:40.250 --> 01:39:44.550

Dawn Gordon: I'm writing it because I don't know that I have an answer for you now. This would be a reflection

845

01:39:45.650 --> 01:39:46.830

Liz Hand, CFP®: fantastic.

846

01:39:48.440 --> 01:39:52.039

Dawn Gordon: I do. I do have one strategy which is



847

01:39:52.150 --> 01:40:07.129

Dawn Gordon: putting Metallica's black album on and taking the I do know that the Black album try it. It works.

848

01:40:07.260 --> 01:40:09.090

Liz Hand, CFP®: I love it.

849

01:40:11.250 --> 01:40:24.090

Liz Hand, CFP®: Yeah, cause emotion. Just all it needs is to be felt. And it lasts, I think Stephanie says, like 90 s. Really. when you are fully in it. except when we persist when we avoid it.

850

01:40:24.190 --> 01:40:27.709

Liz Hand, CFP®: then it lingers and it creates all this havoc in our body

851

01:40:27.920 --> 01:40:30.969

Liz Hand, CFP®: so was this helpful for you?

852

01:40:31.000 --> 01:40:32.349

Dawn Gordon: Yes, thank you.

853

01:40:32.980 --> 01:40:33.650

Yeah.

854

01:40:33.860 --> 01:40:37.809

Dawn Gordon: I'm glad I took the risk. It was difficult to do that.

855

01:40:37.930 --> 01:40:41.330

Dawn Gordon: But I'm I'm I wanna grow.

856

01:40:41.360 --> 01:40:42.810

Liz Hand, CFP®: Yeah. So thank you

857

01:40:43.040 --> 01:40:50.970

Liz Hand, CFP®: that. thanks for being willing to put yourself out there. You really I know that other people, whether or not they can express it to you appreciate it.

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01:40:51.780 --> 01:40:52.650

Thank you.

859

01:40:53.420 --> 01:41:02.189

Liz Hand, CFP®: All right, everybody. That's a wrap on our first peak performance peak performance call



really great to spend time with you today.

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01:41:03.040 --> 01:41:10.780

Liz Hand, CFP®: You can always find me on tribe. So if you want to put out there what it is that you're processing happy to coach you there

861

01:41:11.040 --> 01:41:15.229

Liz Hand, CFP®: until I see you again on the third Monday next month.

862

01:41:15.800 --> 01:41:17.840

Liz Hand, CFP®: Take care.

