

# LIMITLESS Coaching Call Transcript

September 16th, 2024  
Personal Peak Coaching Call

20  
00:07:28.960 --> 00:07:30.570  
Liz Hand, CFP®: Welcome back!

21  
00:07:32.590 --> 00:07:33.790  
Liz Hand, CFP®: Happy Monday!

22  
00:07:38.240 --> 00:07:41.999  
Liz Hand, CFP®: I'm excited to see your faces should you decide to get on camera.

23  
00:07:43.320 --> 00:07:44.920  
Liz Hand, CFP®: Hey, Jeremy? Good to see you again.

24  
00:07:45.970 --> 00:07:48.000  
Liz Hand, CFP®: Hi, David! Hi, Cecilia!

25  
00:07:48.320 --> 00:07:49.350  
Liz Hand, CFP®: Hi, Amy!

26  
00:07:49.990 --> 00:07:51.020  
Liz Hand, CFP®: Hey, Jeff!

27  
00:07:59.600 --> 00:08:00.880  
Liz Hand, CFP®: Good morning.

28  
00:08:02.280 --> 00:08:04.630  
Liz Hand, CFP®: Everyone doing great after retreat.

29  
00:08:06.460 --> 00:08:07.980  
Liz Hand, CFP®: Yeah. Awesome

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00:08:08.080 --> 00:08:10.329  
Liz Hand, CFP®: me, too. I got some great insight.



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00:08:14.060 --> 00:08:18.030

Liz Hand, CFP®: Alison, do you have announcements to kick us off, or should I just dive right in.

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00:08:19.064 --> 00:08:42.110

Allison Foulk: The only announcement that I have is, if you are interested in hearing about what limitless 2025 is going to look like we will be covering that at the end of the October 7th coaching call. So you may see that we have some webinars going on, but as a returning member, don't you? Don't need to go to the public webinars because

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00:08:42.110 --> 00:09:00.709

Allison Foulk: it's going to be covering a lot of things you already know. So just be sure to attend October 7th coaching call. We'll have a normal coaching call. We're doing some marketing show and tells with alumni, so it'll be a really good call, but probably the last 30 min or so we will start chatting about what limitless will look like for next year.

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00:09:00.770 --> 00:09:07.910

Allison Foulk: So hope to see you there. If you are interested in participating and come for the the normal coaching call portion, anyway.

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00:09:09.690 --> 00:09:10.410

Liz Hand, CFP®: Awesome.

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00:09:10.900 --> 00:09:12.050

Liz Hand, CFP®: Thanks. Alison.

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00:09:12.570 --> 00:09:13.190

Allison Foulk: Yes.

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00:09:14.540 --> 00:09:22.609

Liz Hand, CFP®: Well, I don't know if this is relevant for some of you, but sometimes, when, especially when we get together for those of you who are together.

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00:09:22.800 --> 00:09:34.240

Liz Hand, CFP®: Sometimes I have this feeling that's like I come off of that retreat, both enthused, but then also a little bit feeling stuck. And so I was curious if that happened to anybody this past week.

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00:09:34.820 --> 00:09:36.439

Liz Hand, CFP®: and if so.

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00:09:36.980 --> 00:09:40.000

Liz Hand, CFP®: say something in the chat or come on

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00:09:40.560 --> 00:09:41.670

Liz Hand, CFP®: screen.

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00:09:45.870 --> 00:09:51.589

Liz Hand, CFP®: But I guess my experience. There's probably a tribe post in this. Actually, I'm certain there's a tribe post in this

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00:09:51.670 --> 00:09:56.720

Liz Hand, CFP®: about this topic. From one of my 1st conferences that I went to so you could look it up.

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00:09:57.256 --> 00:10:00.720

Liz Hand, CFP®: But it talked about this this place of feeling like

46

00:10:01.190 --> 00:10:02.730

Liz Hand, CFP®: these are my people

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00:10:02.810 --> 00:10:07.660

Liz Hand, CFP®: right? So like we get together, and the people that are attracted to limitless have

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00:10:07.670 --> 00:10:10.519

Liz Hand, CFP®: a similar mindset. And so there's a feeling of like

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00:10:10.720 --> 00:10:25.289

Liz Hand, CFP®: belonging when we get together, and it's a time of rapid new information, and I feel like, especially for advisors who are very astute. Quick adapters, like always looking for the new and better way of doing things.

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00:10:25.460 --> 00:10:36.319

Liz Hand, CFP®: You can come off of a conference or a growth retreat and feel like you're behind, or that people are ahead of you. And then it starts this whole comparison thing that can get us stuck.

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00:10:36.950 --> 00:10:40.010

Liz Hand, CFP®: Anyone feeling that? Or is that just Liz land.

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00:10:42.210 --> 00:10:44.289

Jeremy E. Portnoff, MSFS, CFP®, CIMA®, CMT®: I could jump in on that one for sure.

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00:10:44.290 --> 00:10:44.930

Liz Hand, CFP®: Okay.

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00:10:45.551 --> 00:10:48.039

Jeremy E. Portnoff, MSFS, CFP®, CIMA®, CMT®: Yes and no. So

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00:10:48.437 --> 00:10:55.180

Jeremy E. Portnoff, MSFS, CFP®, CIMA®, CMT®: I had a couple of great conversations with with other people who are. Some are in kind of 1st year.

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00:10:55.929 --> 00:11:17.630

Jeremy E. Portnoff, MSFS, CFP®, CIMA®, CMT®: and and further beyond. And you know you, you think of somebody who's further beyond. And it's like, man. How are they doing that like. I can't do that. I'm not going to be good enough to do that, but I I suspect that it's important to remember they might have thought those same things when they were in. You know that same

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00:11:17.660 --> 00:11:19.199

Jeremy E. Portnoff, MSFS, CFP®, CIMA®, CMT®: you know where I'm at.

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00:11:19.970 --> 00:11:22.369

Jeremy E. Portnoff, MSFS, CFP®, CIMA®, CMT®: Right? And then to the other point, like.

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00:11:23.110 --> 00:11:49.059

Jeremy E. Portnoff, MSFS, CFP®, CIMA®, CMT®: Yeah, you learn all this, this great information, and you're like excited about it. Then you're like, how am I gonna get this all done? I can't get it all done. And just for me personally, my issue is that I literally have not had the time to do everything I have to do. But I I did post on tribe over the weekend cause. I I got acceptance or an offer I made for employees, so I will now be hiring my 1st employee, and so like. There's some hope there, and.

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00:11:49.060 --> 00:11:49.720

Liz Hand, CFP®: Yeah.

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00:11:49.720 --> 00:12:12.210

Jeremy E. Portnoff, MSFS, CFP®, CIMA®, CMT®: Encouragement that like, okay, I'm finally gonna be able to start working on these things and chip away at it. And and so there's a lot of optimism mixed in with that feeling of of overwhelm and being stuck. But I think it's that recognition of like, okay, I'll be able to work on this, I'll be able to chip at it, and then, you know, envisioning like, say, when I'm 2 years out.

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00:12:12.820 --> 00:12:24.729

Jeremy E. Portnoff, MSFS, CFP®, CIMA®, CMT®: I might be having a conversation with somebody who's at their 1st retreat, or whatever thinking the same thing, let them know, like he or she to know? Like, Hey, this is normal, you, you know you get there. So.

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00:12:24.730 --> 00:12:25.310

Liz Hand, CFP®: Yeah.

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00:12:26.250 --> 00:12:38.200

Liz Hand, CFP®: totally. Yeah. What I heard you say is that there was a moment of inspiration, and then it flipped to self judgment. And I think that's exactly what can happen is we get really inspired by other people's stories. And then we're like, Oh.



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00:12:38.320 --> 00:12:44.699

Liz Hand, CFP®: there's something for me that I can't get to what I love about what you said is this trust that came into that?

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00:12:44.840 --> 00:12:48.859

Liz Hand, CFP®: And so I just want to remind everybody about that self-trust in the process.

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00:12:49.070 --> 00:12:52.219

Liz Hand, CFP®: I'm going to be able to work on this. It's coming.

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00:12:52.480 --> 00:12:55.410

Liz Hand, CFP®: Other people were at this point at some point, too.

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00:12:56.350 --> 00:13:01.730

Liz Hand, CFP®: and I'm recalling specific coaching sessions where for our firm, like.

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00:13:01.780 --> 00:13:08.020

Liz Hand, CFP®: we're kind of similar story, wise to Jared and Tip, Coach Jared and Coach Tiffany's story of Like.

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00:13:08.080 --> 00:13:19.830

Liz Hand, CFP®: you know, Jared was the second generation, son of the the 1st generation, and then taking over the practice and then making some changes. So I've always kind of like used them as my benchmark. Of how do I do this? And I remember

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00:13:19.900 --> 00:13:26.430

Liz Hand, CFP®: you know it's such precious time when you get face to face time with them, and you ask a question of like, Well, how did you get here?

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00:13:26.440 --> 00:13:32.517

Liz Hand, CFP®: And then the story comes out. I did this, and then I did this, and then this, and then this, and then this, and then this, and then this, and it's like a

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00:13:33.330 --> 00:13:35.059

Liz Hand, CFP®: like what's that called on the

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00:13:35.410 --> 00:13:40.000

Liz Hand, CFP®: on the playground that you get, and it's spinning so fast that you don't know how to jump onto it.

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00:13:40.220 --> 00:13:41.090

Eric Walters: Merry-go-round.



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00:13:41.090 --> 00:13:42.829

Liz Hand, CFP®: Merry-go-round. Thank you, Eric.

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00:13:43.600 --> 00:13:59.469

Liz Hand, CFP®: A merry go round. It's like once they got telling me their story. It's just going so fast, I'm like, oh, I'm never going to be able to jump onto this merry go round. I want to have fun like they are. I want to be successful like they are, and remember you can always slow down the merry-go-round, because it is just one step

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00:13:59.560 --> 00:14:00.699

Liz Hand, CFP®: after the other.

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00:14:01.020 --> 00:14:03.300

Liz Hand, CFP®: We make the road by walking.

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00:14:03.570 --> 00:14:09.130

Liz Hand, CFP®: so just some encouragement for you. If you're feeling a little bit stuck. Post retreat, remember one step at a time.

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00:14:09.470 --> 00:14:12.579

Liz Hand, CFP®: Alright. So everyone. Thank you for that share. Jimmy.

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00:14:13.427 --> 00:14:18.489

Liz Hand, CFP®: Everyone we're going to check in, as we normally do. One is, I'm doing great.

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00:14:19.420 --> 00:14:20.900

Liz Hand, CFP®: 2 is.

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00:14:21.010 --> 00:14:22.629

Liz Hand, CFP®: I got a couple speed bumps.

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00:14:22.680 --> 00:14:25.019

Liz Hand, CFP®: but I'm feeling good for most motion

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00:14:25.100 --> 00:14:27.280

Liz Hand, CFP®: and 3 is, I feel stuck.

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00:14:32.130 --> 00:14:38.990

Liz Hand, CFP®: Jeff. That's an exclamation next to a 2, and I can't tell if that's like yes, I'm at a 2, or like I'm at a 2. Help me.

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00:14:39.140 --> 00:14:40.539



Jeff J. Dunn-Bernstein, AIF®: I'm always at a 2.

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00:14:40.540 --> 00:14:41.470

Liz Hand, CFP®: Oh, okay.

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00:14:41.470 --> 00:14:44.150

Jeff J. Dunn-Bernstein, AIF®: There's always a lot of stuff, but I'm always cool.

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00:14:44.330 --> 00:14:47.209

Liz Hand, CFP®: Would you shift it more towards the 3 or more towards the one.

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00:14:48.110 --> 00:14:52.759

Jeff J. Dunn-Bernstein, AIF®: I think it's pretty solid, Leah, too. It's a solid exclamation point, too. I think.

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00:14:52.760 --> 00:14:53.589

Liz Hand, CFP®: Oh, okay.

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00:14:54.040 --> 00:14:54.890

Liz Hand, CFP®: nice

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00:14:55.970 --> 00:14:57.350

Liz Hand, CFP®: or not. Nice. I don't know.

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00:14:57.950 --> 00:14:58.300

Jeff J. Dunn-Bernstein, AIF®: It's fine.

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00:14:58.300 --> 00:15:01.930

Liz Hand, CFP®: Alright and okay. So I'm seeing quite a few twos.

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00:15:02.080 --> 00:15:04.559

Liz Hand, CFP®: a 1 to 2 and a 3.

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00:15:05.744 --> 00:15:07.699

Liz Hand, CFP®: Eric, talk a little bit about your 3.

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00:15:10.120 --> 00:15:36.808

Eric Walters: Well, things are going, I think, pretty well at work. I think what I'm struggling with is just what I know has come up in prior calls, just negative emotions. My business partner is my spouse, and what I'm experiencing is more conflict. About marketing. And how how should we go forward? And then just personal things are kind of just, you know, like anyone who's in a, you know, committed relationship. And so what I find is

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00:15:37.415 --> 00:15:51.669

Eric Walters: my, you know, my experience, I think, is a lot of, you know, negative emotions, whether it's fear or resentment, and that's really coming into my work day. And it's been, you know, building over a week or 2. So it's not an emergency. It's just one of those like.

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00:15:52.250 --> 00:15:53.760

Eric Walters: you know, emotions.

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00:15:54.120 --> 00:15:54.820

Liz Hand, CFP®: Yeah.

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00:15:56.178 --> 00:16:07.119

Liz Hand, CFP®: I don't know what it's like to work with my spouse, but I definitely know how to work, how it is to work with family and the stacked different responsibilities. I'm curious if there's anybody else working with family that has that similar type

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00:16:07.450 --> 00:16:14.330

Liz Hand, CFP®: experience. And maybe we could create a little group around that or maybe someone who feels like family.

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00:16:15.260 --> 00:16:17.080

Liz Hand, CFP®: Sometimes we get into

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00:16:17.427 --> 00:16:23.070

Liz Hand, CFP®: like we hire someone that is our neighbor, or that is a close family friend that feels like family.

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00:16:23.530 --> 00:16:27.940

Liana Poodiack: Well, I I work with my son. So that's that's pretty close.

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00:16:27.940 --> 00:16:28.610

Liz Hand, CFP®: Yeah.

111

00:16:29.910 --> 00:16:31.719

Liana Poodiack: I think it's hard.

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00:16:31.880 --> 00:16:34.840

Liana Poodiack: You really have to try hard to separate

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00:16:35.390 --> 00:16:43.400

Liana Poodiack: the business from the family life and try to only talk business when you are within the walls of your office.

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00:16:45.320 --> 00:16:51.559

Liana Poodiack: and you know, having those conversations those reminders about. Oh, you know

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00:16:51.770 --> 00:16:56.099

Liana Poodiack: we're closed for the day. We'll resume tomorrow. Set yourself.

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00:16:56.170 --> 00:17:03.069

Liana Poodiack: you know, set time and make it formal where you're going over certain goals of the business, and

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00:17:03.501 --> 00:17:07.859

Liana Poodiack: you know things that are bothering you so that you're not letting it build.

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00:17:07.980 --> 00:17:11.030

Liana Poodiack: because if if she were an employee.

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00:17:11.319 --> 00:17:13.400

Liana Poodiack: you know, you would treat her differently.

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00:17:14.849 --> 00:17:15.449

Liana Poodiack: Like.

121

00:17:16.459 --> 00:17:25.009

Liana Poodiack: so I'm not sure who is the higher, you know, higher on the total pole or not, but you know, kind of just going into it with a set

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00:17:25.119 --> 00:17:31.479

Liana Poodiack: set agenda for a weekly meeting of the status of different projects and stuff.

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00:17:31.729 --> 00:17:33.829

Liana Poodiack: I have a hard time being.

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00:17:34.700 --> 00:17:46.969

Liana Poodiack: My assistant, Alexis. She's not a family member, but she's worked with us for over 8 years, and when it comes to things not getting done, I I have a softer approach to that.

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00:17:47.109 --> 00:17:51.699

Liana Poodiack: But I find having that weekly meeting

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00:17:51.839 --> 00:17:55.149

Liana Poodiack: where we can all be held accountable for what

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00:17:55.249 --> 00:17:56.929  
Liana Poodiack: we need to get done.

128  
00:17:57.269 --> 00:18:07.279  
Liana Poodiack: you know, and and she may have some things, you know, from her perspective on maybe what you might need to do, or something like that, so it can be a 2 way street.

129  
00:18:08.080 --> 00:18:17.459  
Liana Poodiack: You know, a brainstorming session or having, you know, different things that are going on with clients. We use a program called 90.

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00:18:17.549 --> 00:18:20.789  
Liana Poodiack: That helps us keep our team meetings

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00:18:20.889 --> 00:18:22.919  
Liana Poodiack: and check-ins kind of

132  
00:18:22.959 --> 00:18:24.129  
Liana Poodiack: structured

133  
00:18:24.743 --> 00:18:28.299  
Liana Poodiack: and that makes it easier. You can even use it to

134  
00:18:28.659 --> 00:18:41.409  
Liana Poodiack: design what they call rocks. You know where you have projects that might be a longer project that you need to get done, and that you have check-ins, and you have to develop that particular rock to say, Well, what are the next steps?

135  
00:18:41.459 --> 00:18:47.869  
Liana Poodiack: And you can each be assigned a couple of different rocks a month or a quarter to be working on.

136  
00:18:47.969 --> 00:18:52.399  
Liana Poodiack: and that you're checking in on the status of those things so that things don't get dropped.

137  
00:18:52.549 --> 00:18:55.769  
Liana Poodiack: and that might take away some of that.

138  
00:18:56.109 --> 00:18:59.599  
Liana Poodiack: you know. Anxiety, or whatever you're feeling, if you have.

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00:18:59.919 --> 00:19:04.679

Liana Poodiack: can think of it more as a business, and maybe not as a conflict between a husband and a wife.

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00:19:06.460 --> 00:19:08.579

Liz Hand, CFP®: Easier said than done, I'll say.

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00:19:08.580 --> 00:19:13.549

Liana Poodiack: Yes, but that's like kind of put the work hat on and and make it a formal.

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00:19:14.180 --> 00:19:15.190

Liana Poodiack: you know.

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00:19:15.530 --> 00:19:20.360

Liana Poodiack: meeting or something, and I don't know if it's just the 2 of you, or if you have other staff people or not. But.

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00:19:20.770 --> 00:19:44.409

Eric Walters: Yeah, it is. Yeah. We've worked together for 6 years. And we do have a a, I think, an excellent working relationship. We do. We're very business focused on our weekly meetings. Our quarterly meetings are exactly that their quarterly rock meetings. We take the limitless weekly meeting agenda. So I think we've implemented that. Well, I think what I'm experiencing is challenges in our personal relationship

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00:19:44.460 --> 00:20:12.990

Eric Walters: and how we're interacting. And you know, arguments, things that really don't have anything to do with business. And that that is now affecting how we work together. And you know she's, you know, co-founder of the firm, and she's she's very entrepreneurial, and she's like, you know, I don't want to be involved in this firm anymore, because you've and we've decided I'm going to do all the boring stuff. So compliance, you know, preparing financial statements for the firm client, billing a few technology things

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00:20:13.180 --> 00:20:35.069

Eric Walters: which, if you would prepare a list of things that would be death to most entrepreneurial people. Those would be top of the list. So how so? You know our personal relationship, I think, is having some rocky moments, and then when she goes to work, all of her tasks are like, I I literally hate every one of these things. And so how to navigate that and how to have her kind of extract

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00:20:35.070 --> 00:21:00.731

Eric Walters: from the business while she still feels like, I'm part of the business. I want to make decisions. And my perspective is like, you're not anymore, you know. Yes, you're an equity holder, but you're not involved in the business. So how do you lose a co-founder? And and then, you know, we've just got personal relationship, you know, stuff that's bleeding this way. It's I. I see a lot of people talk about that way, you know. Don't bring it home. And I'm like, Well, that's okay.

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00:21:01.180 --> 00:21:10.979

Eric Walters: But it's the other way. And so you know it's that's a that's a different, you know. Kind of

coaching, counseling. You know, topic. But that's that's what's going on for me.

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00:21:10.980 --> 00:21:30.020

Liz Hand, CFP®: Well, and what I just want to express is, I think that's a lot more common than you believe. Just in the engagements that I've had personally, and hearing stories from other people. If you're willing to be coached around it without going into like, you can keep your personal life personal, but find what's stuck in you?

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00:21:30.302 --> 00:21:34.499

Liz Hand, CFP®: We can absolutely coach around it. So do you want to be coached around it?

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00:21:34.500 --> 00:21:35.709

Eric Walters: Sure I'd be happy to.

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00:21:36.800 --> 00:21:38.459

Liz Hand, CFP®: I'm gonna PIN you. So I

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00:21:38.980 --> 00:21:40.009

Liz Hand, CFP®: don't have you.

154

00:21:42.150 --> 00:21:44.769

Liz Hand, CFP®: Let's see, I need to see myself.

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00:21:44.920 --> 00:21:47.730

Liz Hand, CFP®: I'll PIN me, too. So you're not the only one on the screen.

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00:21:48.800 --> 00:21:49.910

Liz Hand, CFP®: There you go!

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00:21:50.410 --> 00:21:51.060

Eric Walters: There we go!

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00:21:51.650 --> 00:21:55.079

Liz Hand, CFP®: Alright. So if you could

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00:21:55.600 --> 00:22:00.490

Liz Hand, CFP®: generate any outcome for yourself through this conversation, what do you want to create.

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00:22:02.110 --> 00:22:03.700

Eric Walters: That's a great question.

161



00:22:05.280 --> 00:22:07.020  
Eric Walters: probably some

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00:22:07.850 --> 00:22:12.960  
Eric Walters: clarity on how to handle business decisions that we have ahead of us

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00:22:13.910 --> 00:22:14.980  
Eric Walters: together.

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00:22:16.460 --> 00:22:27.670  
Eric Walters: Understanding, acknowledging that there are tensions personally. But we these, you know, business decisions do need to be made. You know, we're thinking about hiring another employee. We've thought about that for quite a while.

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00:22:28.320 --> 00:22:38.320  
Eric Walters: And do we go forward immediately right now? Or do we engage a, you know business, website and marketing firm? First, st they're both big ticket items we have.

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00:22:38.320 --> 00:22:38.670  
Liz Hand, CFP®: One.

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00:22:38.670 --> 00:22:39.940  
Eric Walters: Bestie, probably for one.

168

00:22:40.000 --> 00:22:46.219  
Eric Walters: and that's an important and exciting decision. But there's tension between us.

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00:22:46.220 --> 00:22:46.810  
Liz Hand, CFP®: Okay.

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00:22:46.810 --> 00:23:05.160  
Eric Walters: That hasn't been in the past in the past. We've been, you know, like, Hey, let's look at the data. It's great, as you know things grow and change. We have another big decision, but this one feels like it'll be different, because, excuse me of some of this personal intentions. So, figuring out, how do you? How do we have that? And then maybe maybe some help with my own.

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00:23:05.270 --> 00:23:16.289  
Eric Walters: you know, mind space just about a personal relationship that's really important to me. That is not where I'd like it to be. You know, wrestling with coming to work. But

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00:23:16.680 --> 00:23:25.510  
Eric Walters: a big part of my mental space is, what did we just talk about? Or there was a fight, or you know, and I'm sure no one can relate to this but just.



173

00:23:25.510 --> 00:23:26.810

Liz Hand, CFP®: Me yesterday at all.

174

00:23:27.000 --> 00:23:37.350

Eric Walters: Yeah, exactly. And just coming to work like, okay, time to go to work. But, my, my, you know, emotions or mind is still kind of like. Oh, there's this part that doesn't feel great, you know.

175

00:23:39.110 --> 00:23:42.599

Liz Hand, CFP®: Yeah. So the interesting thing here is, we can always talk boundaries.

176

00:23:42.760 --> 00:23:54.530

Liz Hand, CFP®: which is kind of the the way that Leona was having the conversation. Yes, there's boundaries that can be put in place, sure. But there's also this emotion component. And so you keep using the word tension.

177

00:23:55.290 --> 00:23:56.839

Liz Hand, CFP®: What does that mean to you?

178

00:23:57.940 --> 00:24:16.970

Eric Walters: You know, I mean, I think, for us, I think we will, you know, not see eye to eye on day to day, things personally. And you know, there's kind of like little quarrels that break up and then it's not resolved, you know, and then, you know, from at least on my side. It feels like things are not.

179

00:24:16.970 --> 00:24:32.119

Eric Walters: you know, necessarily close between us, right? We've had a disagreement about something or the other, or you know whatever and then tension with kids or just life kind of comes up and then it just doesn't feel settled. So for me, that's what I mean by tension.

180

00:24:33.050 --> 00:24:36.700

Liz Hand, CFP®: What predictably happens to you when you don't feel close to someone.

181

00:24:39.450 --> 00:25:05.629

Eric Walters: you know, for me, I'll start to worry that the relationship is, you know, somehow, at risk or the bad things are gonna happen. And I'll feel sense of anxiety. And so and that's you know what I kind of bring to work. It's like rather than rather than coming and being like, Hey, it's a great day, you know, in the neighborhood, you know. We've got so much good stuff going on, and we do personally and at work. It's like the only thing I can think about, and it's not a feeling of

182

00:25:05.913 --> 00:25:23.500

Eric Walters: like. Oh, I'm sure it'll be okay. It's anxiety and fear like, Oh, man, like what if you know? You know you have friends that are going through breakups, you know, and terrible things happening. And you're like, Oh, jeez like is that? Is that in the future, you know you. Your mind goes to different fears, you know, with important relationships.

183



00:25:26.540 --> 00:25:27.610

Liz Hand, CFP®: So

184

00:25:28.240 --> 00:25:32.769

Liz Hand, CFP®: what are you protecting yourself? What is the what if that you're protecting, protecting yourself from.

185

00:25:35.284 --> 00:25:36.540

Eric Walters: That's a good question.

186

00:25:38.160 --> 00:25:54.130

Eric Walters: probably you know, I can say it's hard. It's pretty hard for me to have honest conversations with people that I care about in my, you know family we never did. And so even that even the thought of like, Hey, let's sit down and have this difficult conversation I like break out and sweat.

187

00:25:54.130 --> 00:26:20.650

Eric Walters: And so, yeah, of course, you need to do that with people that are important to you, whether they're employees or partners or personal. But so that's like, okay, yeah, I need to do it. And sometimes I've handled those relation, those conversations badly where I'll blame them, or I'll get angry, or whatever. And so it's like, well, how do you? How do you do that? I don't know. I feel like an emotional kindergartner. Sometimes, like people are like you should share your feelings and talk to your spouse about it. And I'm like.

188

00:26:20.964 --> 00:26:45.519

Eric Walters: Let that like, okay, apparently you know how to do this, and every self help book says, Yeah, do it. But you we those have ended in fights, or I. I said something stupid or or she's like, you know what I'm I'm out like you're clearly upset. I'm done. And I was like, Oh, I was just about to share my feelings, and so that I guess I feel like we need to have those conversations. But

189

00:26:45.730 --> 00:26:47.200

Eric Walters: it's like, Oh, jeez like.

190

00:26:47.730 --> 00:26:50.489

Eric Walters: is there a decoder ring on how to do that? Well, I don't know.

191

00:26:50.961 --> 00:27:05.330

Eric Walters: and it's and and to be fair, you know this this is not, you know, like marriage counseling, but we do have an appointment with a marriage counselor set up. So like I'm sure many of you are like this sounds bad. You should see a counselor. We we will like we, we.

192

00:27:05.330 --> 00:27:17.350

Liz Hand, CFP®: Yes, absolutely. And you don't have to protect everyone here in this moment. Everything that you're experiencing is completely human. And the the point of mindset is to really get to the heart for you what's happening?

193



00:27:17.390 --> 00:27:22.250

Liz Hand, CFP®: Right? So you know your wife's not in the room. We're not. We're not having a counseling session so.

194

00:27:22.250 --> 00:27:22.940

Eric Walters: Right, yeah.

195

00:27:22.940 --> 00:27:26.370

Liz Hand, CFP®: Yes, all, all is fine. We're we're fine right now.

196

00:27:26.885 --> 00:27:31.249

Liz Hand, CFP®: You! Said the comment. You're clearly upset. I'm out.

197

00:27:31.720 --> 00:27:35.079

Liz Hand, CFP®: and that was attached to you, showing up emotionally

198

00:27:35.640 --> 00:27:37.539

Liz Hand, CFP®: or vulnerably, I guess.

199

00:27:39.420 --> 00:27:40.620

Liz Hand, CFP®: Did I hear that right?

200

00:27:40.620 --> 00:27:41.680

Eric Walters: Yeah, yeah.

201

00:27:42.030 --> 00:27:43.500

Liz Hand, CFP®: So what is your story?

202

00:27:45.311 --> 00:27:47.370

Eric Walters: Tell me! Understand that question!

203

00:27:48.422 --> 00:27:51.949

Liz Hand, CFP®: Actually, I'll assert your story, and then you tell me how you'd tweak it.

204

00:27:51.950 --> 00:27:52.540

Eric Walters: Okay.

205

00:27:52.820 --> 00:27:55.760

Liz Hand, CFP®: The story is when I show up emotionally.

206

00:27:56.660 --> 00:27:58.420

Liz Hand, CFP®: someone else walks away.



207

00:28:00.110 --> 00:28:04.670

Eric Walters: Yeah, yeah, right? That that is kind of a common dynamic. Yeah.

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00:28:04.670 --> 00:28:09.230

Liz Hand, CFP®: Okay. And that may or may not be true every time. How true does it feel.

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00:28:09.650 --> 00:28:10.889

Eric Walters: Pretty true.

210

00:28:11.180 --> 00:28:12.060

Liz Hand, CFP®: Pretty true. Okay.

211

00:28:12.060 --> 00:28:14.690

Eric Walters: Yeah, I'd say, majority of the time, yeah.

212

00:28:14.900 --> 00:28:15.550

Liz Hand, CFP®: Okay?

213

00:28:18.900 --> 00:28:19.790

Liz Hand, CFP®: So

214

00:28:19.950 --> 00:28:23.260

Liz Hand, CFP®: when I had asked like, What's the what if that you are

215

00:28:24.206 --> 00:28:28.340

Liz Hand, CFP®: shielding yourself against? You? Went to hard conversation.

216

00:28:28.800 --> 00:28:29.430

Eric Walters: Hmm.

217

00:28:34.550 --> 00:28:38.450

Eric Walters: yeah, I I guess. My, you know, kind of

218

00:28:38.810 --> 00:28:49.850

Eric Walters: grasping for like, what do you do? I guess my kind of programming thought is like, well, you're supposed to talk it out and work it out. So I feel like it's a should like we should have a

219

00:28:50.130 --> 00:29:11.370

Eric Walters: of this honest conversation, and we should for our feelings, because everyone and their mother and their grandmother, and every advice book in the world you're you should have this conversation, and in the back of my mind it's like, Well, Fudge, like I don't know how to do that, and



they don't always go well, but I guess we're supposed to do. You know, it just kind of feels like you're supposed to clean the toilet. You're like.

220

00:29:12.097 --> 00:29:15.300

Eric Walters: Yummy, that's that's great, you know. Just.

221

00:29:15.300 --> 00:29:16.480

Liz Hand, CFP®: Well, and even in your.

222

00:29:16.480 --> 00:29:17.090

Eric Walters: And.

223

00:29:17.560 --> 00:29:24.879

Liz Hand, CFP®: Even in the way that you said those words like, Oh, yeah, I'm gonna have to do this. Okay, yeah. Everybody's doing it. Like, what are you pissed off about.

224

00:29:25.870 --> 00:29:31.140

Eric Walters: Just, you know. Well, I think historically, they're trying to show up and not be listened to. I think that's hard.

225

00:29:31.940 --> 00:29:35.540

Eric Walters: You know. I think that's a dynamic in my relationship.

226

00:29:36.330 --> 00:29:46.919

Eric Walters: you know, you just you feel like, like, I think I'm learning to say my perspective is valid. And these feelings are important, and it's not that they are reality. It's just like it's all I got.

227

00:29:47.479 --> 00:29:51.100

Eric Walters: So I think that's that. It certainly makes you feel angry.

228

00:29:51.710 --> 00:29:57.429

Eric Walters: yeah, I think that's probably it. And then also this feeling that like, somehow, I'm supposed to know how to do this

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00:29:57.530 --> 00:30:22.440

Eric Walters: like people, you know, like literally like I talked to my Guy friends like, well, you know, you really should talk to your wife. I was like, look if I hear that once more, I swear. Yes, yes, we should talk as if as if like talking always makes it better. Right? You never fight with your wife, and you have this, and they'll be like, Oh, well, actually, that's right. And I'm like, Yeah, I think maybe we just like have a mediator or something that's like, maybe I shouldn't go have these conversations.

230

00:30:23.550 --> 00:30:38.169

Liz Hand, CFP®: So, even in the preparation to have the conversation, which is one act of courage you're hearing these voices of like you should be doing this. And so you're like reacting both to the act of



having the conversation and your own feelings about competence in it.

231

00:30:38.380 --> 00:30:54.059

Eric Walters: Right, and then, you know, full disclosure. You know I've got a lot of shoulds for the person on the other side. You know this, my spouse should be doing this, and they shouldn't be doing that. And I can't believe they said that. So then it's like all my shoulds, you know. So yeah, there's a lot of expectations

232

00:30:54.090 --> 00:30:57.349

Eric Walters: around on myself, and then I'm throwing them the other way.

233

00:30:57.510 --> 00:30:58.180

Eric Walters: So.

234

00:30:59.470 --> 00:31:01.939

Liz Hand, CFP®: Would you like to talk about your self-righteousness.

235

00:31:02.770 --> 00:31:04.990

Liz Hand, CFP®: or the other voices.

236

00:31:05.740 --> 00:31:11.280

Eric Walters: I. You know, I think it's probably better stick to myself. Just see? Yeah.

237

00:31:11.420 --> 00:31:13.399

Eric Walters: yeah, because I can control that.

238

00:31:14.710 --> 00:31:16.900

Liz Hand, CFP®: What's so important about you being right.

239

00:31:18.765 --> 00:31:23.735

Eric Walters: That's a great question. How? Where do you come up with these questions? Jeez

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00:31:28.180 --> 00:31:33.300

Eric Walters: I don't know, I think. I think I have a fear of failure and a fear of being wrong.

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00:31:34.120 --> 00:31:35.679

Eric Walters: In the past.

242

00:31:36.640 --> 00:31:40.229

Eric Walters: you know. Sometimes I've been wrong. It just seems like it.

243

00:31:40.800 --> 00:31:59.389



Eric Walters: you know bad things happen. So I think it's a protecting like I have to be right, you know, and I'm the guy that likes to research the cars and research the gear like, is it? Is it the best? Is it the best you know? Trail running Shoe? I don't know. I'll read 42, you know. Reviews. So, yeah, being right is pretty important to me. And I think it's tied to being safe.

244

00:32:00.590 --> 00:32:01.250

Eric Walters: you know.

245

00:32:02.990 --> 00:32:06.620

Liz Hand, CFP®: And how is that getting in the way of conversations.

246

00:32:08.302 --> 00:32:13.279

Eric Walters: Probably cause. If I was on the receiving end of my shoulds, I'd probably be kind of

247

00:32:13.390 --> 00:32:17.900

Eric Walters: you know. It probably put me on the defensive. So I'm probably putting my spouse.

248

00:32:17.900 --> 00:32:18.540

Liz Hand, CFP®: Was he there?

249

00:32:18.960 --> 00:32:21.759

Liz Hand, CFP®: Yeah, you just jumped onto her side like.

250

00:32:21.890 --> 00:32:25.989

Liz Hand, CFP®: think you said your spouse was away? He jumped on her side of the street.

251

00:32:25.990 --> 00:32:27.370

Eric Walters: Just there, right.

252

00:32:28.170 --> 00:32:29.900

Liz Hand, CFP®: You weren't in your own feet.

253

00:32:30.460 --> 00:32:31.726

Eric Walters: Yeah, I

254

00:32:32.630 --> 00:32:35.249

Eric Walters: So if we could go back, say your question again.

255

00:32:37.420 --> 00:32:38.409

Liz Hand, CFP®: I don't remember it.

256

00:32:38.623 --> 00:32:45.659



Eric Walters: I think it was. It was on the line of like. Why is it so important to be right? And what I think is holding me back? Or what was it like? Negative.

257

00:32:45.660 --> 00:32:48.070

Liz Hand, CFP®: Oh, how is it getting in the way of your conversation?

258

00:32:48.905 --> 00:32:50.090

Eric Walters: How's it going?

259

00:32:51.866 --> 00:32:53.900

Eric Walters: I think because it

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00:32:54.370 --> 00:33:00.620

Eric Walters: you I don't know how to describe how it gets in the way, but I think it injects anger or emotion that's not very helpful.

261

00:33:00.680 --> 00:33:07.879

Eric Walters: and probably rather than listen and try to understand. I'm coming like more from a high horse or judgment.

262

00:33:12.300 --> 00:33:18.470

Liz Hand, CFP®: Yeah, the image that I just got there is. There's a way that you have this this feeling of like, I'm right. I'm valid.

263

00:33:18.590 --> 00:33:23.739

Liz Hand, CFP®: I know what I'm talking about. I have no valid was the word that you use. I'm valid.

264

00:33:24.750 --> 00:33:34.910

Liz Hand, CFP®: The moment that you let yourself go there, you also come with like, how are they going to feel about it? What's going to happen on to them, how, how are they going to react? And so there's no win in that.

265

00:33:36.533 --> 00:33:53.159

Eric Walters: Doesn't seem like it, you know. You know one thing this is touching on what I've wrestled with like in the periphery of my mind is, I grew up in a situation where, like no one cared about anybody's feelings. Literally, I grew up in Wisconsin, and God bless them! You know, people in Wisconsin were basically like, Look suck it up. Buttercup.

266

00:33:53.480 --> 00:34:13.729

Eric Walters: I'm sorry you skinned your knee. Get back out in the game, you know, and it's like, I'm having a bad day. Well, you have food and people in Africa like, I'm sure that people can complete this narrative. So it's like 0 care about emotions, and I've just gone through life like treating my own emotions that way. But that doesn't work. And so this this is really fascinating. I'd I'd love your thoughts.

267



00:34:13.730 --> 00:34:24.820

Eric Walters: What is interesting is, how does one say to the oneself what my emotion is like? Valid and important? Right like I should pay attention to this emotion. I shouldn't throw it in the trunk.

268

00:34:24.850 --> 00:34:34.109

Eric Walters: you know, cause when I throw it in the trunk it'll like blah blah blah! So that's that's that's like Eric. Your emotion is important, should pay attention to it. Okay, great.

269

00:34:34.150 --> 00:34:51.589

Eric Walters: But then sometimes I'll you know, walk over to my spouse, figuratively or metaphorically, and be like my opinion is all that matters, and it's like, I don't want to square that circle to be like I'm experiencing whatever right anger, fear, resentment, name your negative emotion.

270

00:34:51.610 --> 00:35:01.649

Eric Walters: and it's and normally I would just ignore it like, let's just pretend it's not there and go along, which is a disaster of a strategy. If anyone's trying it, I encourage you to stop.

271

00:35:02.320 --> 00:35:12.320

Eric Walters: But then, in a conversation, I will tend to make that real that that's that she is supposed to now interact with this as reality, right? When it's just.

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00:35:12.710 --> 00:35:18.350

Eric Walters: it's just an emotion. Yes, it's important. So I have no idea how square that circle. But this is touching.

273

00:35:18.888 --> 00:35:21.440

Eric Walters: Yeah, and it leads to self interest. Yeah.

274

00:35:22.310 --> 00:35:22.890

Liz Hand, CFP®: Yeah.

275

00:35:24.060 --> 00:35:33.679

Liz Hand, CFP®: Yeah. What I hear is that you're at an either or place of either. I'm gonna skip over it, and my opinions don't matter. My emotion doesn't matter, or I'm gonna sink into it. And I'm gonna get stuck there. I'm just gonna.

276

00:35:34.820 --> 00:35:51.419

Eric Walters: And then I'm gonna and I'm gonna kind of go to this. You know, this person I love very much and say, Well, because I'm experiencing this. This is reality for everyone in the room, and you need to react to it. And you know, and it becomes very judgy and self, righteous and angry. And yeah.

277

00:35:52.110 --> 00:36:05.272

Eric Walters: those are. Those are like 2 pretty bad imaginary decisions like, either you're gonna ignore it or you're gonna make it reality and get really angry. Those are like the I'd like to. I'd like a 3rd option. Please.



278  
00:36:05.610 --> 00:36:07.020  
Liz Hand, CFP®: Create one? What is it.

279  
00:36:07.360 --> 00:36:08.380  
Eric Walters: I. It's like

280  
00:36:08.390 --> 00:36:22.069  
Eric Walters: it's like, somehow, like accepting the emotion and then somehow letting it go like in like like on my own. I feel like I should just be like, you're good, Eric, like. Let's journal about this, and let's validate that emotion, and

281  
00:36:22.390 --> 00:36:25.090  
Eric Walters: that's cool. And then like, let it go

282  
00:36:25.140 --> 00:36:34.919  
Eric Walters: when I'm talking to her, and rather than be like, I have to bring this emotion to you, and you have to react to it. It almost feels like it'd be better on my own just to be like.

283  
00:36:35.150 --> 00:36:39.050  
Eric Walters: okay. Saw it processed. It, accepted it

284  
00:36:39.190 --> 00:36:43.049  
Eric Walters: sweet. Now I'm good. And now I can have like.

285  
00:36:43.060 --> 00:36:50.979  
Eric Walters: and maybe I maybe you do mention it, but it's not like the reality of the conversation. I don't know if that makes any sense, but that seems like a better approach.

286  
00:36:51.640 --> 00:36:53.199  
Liz Hand, CFP®: How would you do that? Practically.

287  
00:36:54.550 --> 00:36:58.639  
Eric Walters: I've I've been experimenting with journaling and meditation, and they're both

288  
00:36:58.800 --> 00:37:17.569  
Eric Walters: really really cool. A friend who's involved in alcoholics anonymous shared this thing that. Basically, you write down really simple thing. It's like, I have fear, blank, I have fear, blank. And it's a daily. It's a daily writing thing for him. I have fear, I fear. I fear you write these fears, and then you say I have resentment at

289  
00:37:17.570 --> 00:37:40.519  
Eric Walters: whatever you know political party person. You know your broken shoulder, whatever,

because I have fear, and then you write that down, and then they have this concept of a higher power. And they said that they have a prayer that they say, please help me, let go of these fears and resentments, and then they rip it into small pieces, so no one ever finds it, and they get rid of it. I think something like that seems a lot more healthy

290

00:37:40.630 --> 00:37:44.339

Eric Walters: and ignoring it, or, you know, somehow spewing it all over.

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00:37:47.190 --> 00:38:01.240

Liz Hand, CFP®: Yeah, I think that is a great way of processing through it. I think that you know when I what it reminded me of is, and I've probably shared this metaphor before is like a pop. Can that we have that gets shaken up? Shake, shake, shake, shake, shake, shake, shake, shake shake! Who wants to open it

292

00:38:01.860 --> 00:38:03.610

Liz Hand, CFP®: some point it's going to burst open.

293

00:38:04.050 --> 00:38:12.759

Liz Hand, CFP®: And so what I hear you doing with that practice, if you integrate it in a regular cadence for yourself is letting out some of the gas that gets built up

294

00:38:13.660 --> 00:38:14.620

Liz Hand, CFP®: that pressure

295

00:38:14.830 --> 00:38:17.190

Liz Hand, CFP®: as to not get it all over. Somebody.

296

00:38:19.400 --> 00:38:20.740

Eric Walters: Yeah, yeah.

297

00:38:22.390 --> 00:38:24.259

Eric Walters: And then I think. And then I think.

298

00:38:24.260 --> 00:38:24.819

Liz Hand, CFP®: Go ahead!

299

00:38:25.050 --> 00:38:36.079

Eric Walters: I was gonna say. And then I think, maybe probably asking, you know people I trust you could. I could probably get some feedback on when and how to bring any of that into a conversation

300

00:38:36.390 --> 00:38:38.549

Eric Walters: with my loved one.

301

00:38:38.590 --> 00:38:47.779



Eric Walters: you know. Maybe you don't. Not. Every strong motion needs to be telegraphed Eric, and but it is in the same regards, does not, should not be ignored.

302

00:38:47.930 --> 00:38:48.880

Eric Walters: So yeah.

303

00:38:48.880 --> 00:38:49.790

Liz Hand, CFP®: Absolutely.

304

00:38:49.790 --> 00:38:51.660

Eric Walters: And this is, this is very helpful.

305

00:38:52.320 --> 00:38:53.860

Liz Hand, CFP®: Did we get to where you wanted to go?

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00:38:54.590 --> 00:38:56.600

Eric Walters: I think so. This has been great. Thank you.

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00:38:56.800 --> 00:38:57.410

Liz Hand, CFP®: Awesome.

308

00:38:57.630 --> 00:38:58.160

Liz Hand, CFP®: Yeah.

309

00:38:58.160 --> 00:38:59.750

Eric Walters: Thank you. Everyone for.

310

00:39:00.070 --> 00:39:03.300

Liz Hand, CFP®: Yeah, a quick share on that. Maybe I've

311

00:39:03.340 --> 00:39:09.260

Liz Hand, CFP®: shared the story before or not. It was a very poignant time for me. Last last year we did our strategic planning meeting with the

312

00:39:09.390 --> 00:39:15.830

Liz Hand, CFP®: with the team, and we brought our coach in to facilitate it, and she did a little bit of training around it.

313

00:39:16.240 --> 00:39:18.579

Liz Hand, CFP®: And with that it surfaced some.

314

00:39:18.750 --> 00:39:21.779



Liz Hand, CFP®: some frustrations of the team directly towards me.

315

00:39:22.060 --> 00:39:23.480

Liz Hand, CFP®: I'm an emotional person.

316

00:39:24.120 --> 00:39:26.390

Liz Hand, CFP®: I don't mind showing emotion in front of people.

317

00:39:26.460 --> 00:39:28.470

Liz Hand, CFP®: and it felt like an attack

318

00:39:28.710 --> 00:39:30.569

Liz Hand, CFP®: felt really uncomfortable.

319

00:39:33.310 --> 00:39:38.900

Liz Hand, CFP®: There was like a technical glitch that had happened, and my team thought that I was like completely switching

320

00:39:38.990 --> 00:39:56.469

Liz Hand, CFP®: the vision, even though I had like done so much work to co-create it with them to like. Get everybody's buy in, because that's how you're supposed to do this leadership thing and over. Communicate on it all of all of it, to point to this moment where everybody's like you changed the vision again. And I'm like it was technology. But it surfaced this

321

00:39:56.740 --> 00:39:58.890

Liz Hand, CFP®: resentment that they had with me.

322

00:39:59.820 --> 00:40:00.890

Liz Hand, CFP®: It sucked

323

00:40:01.560 --> 00:40:02.869

Liz Hand, CFP®: like we were

324

00:40:02.900 --> 00:40:09.209

Liz Hand, CFP®: 6 h together, and this is maybe 3 h in, and a good 30 min of talking about Liz.

325

00:40:10.790 --> 00:40:31.411

Liz Hand, CFP®: and what was supposed to happen right after that was for me. Well, actually, we were just getting ready for me to present the vision. And like how we're how we're carrying it out into our strategic plan. And this had surfaced. And so it's like, okay. Now, I'm supposed to be big girl leader in the firm and present this confidently. But I feel like attacked essentially

326

00:40:32.090 --> 00:40:35.539



Liz Hand, CFP®: Were they attacking? Not necessarily. That's just my emotional reaction to it.

327

00:40:35.660 --> 00:40:42.605

Liz Hand, CFP®: So pause, I noticed, like, I'm shaky. I'm shaky. I'm like trying to hold it together.

328

00:40:43.630 --> 00:40:47.299

Liz Hand, CFP®: But I took a pause. I was like, Hey, I need. I need 5 min.

329

00:40:47.340 --> 00:40:51.089

Liz Hand, CFP®: and I walk into the other room, and I physically shake it out

330

00:40:51.700 --> 00:40:54.460

Liz Hand, CFP®: because emotion sits in your body.

331

00:40:54.630 --> 00:40:56.170

Liz Hand, CFP®: It's a psycho.

332

00:40:56.420 --> 00:40:57.640

Liz Hand, CFP®: somatic

333

00:40:57.710 --> 00:41:00.110

Liz Hand, CFP®: body experience that we have.

334

00:41:01.050 --> 00:41:03.500

Liz Hand, CFP®: Emotion is as real as we make it.

335

00:41:03.870 --> 00:41:08.179

Liz Hand, CFP®: and that's not to say that emotions are bad, or like you should skip over them or anything

336

00:41:08.190 --> 00:41:12.019

Liz Hand, CFP®: they they make a physical presence in your body. Nervousness.

337

00:41:12.140 --> 00:41:16.290

Liz Hand, CFP®: scared fear, excitement, like they all have a place

338

00:41:16.858 --> 00:41:24.660

Liz Hand, CFP®: and so, just in like doing that, I was able to give my body the release that it needed that was like pent up like that shaken bottle

339

00:41:25.122 --> 00:41:29.669

Liz Hand, CFP®: as to come back in the room and just hit it right into the vision of the firm.



340

00:41:29.910 --> 00:41:33.670

Liz Hand, CFP®: And so I just offer that as another option for you.

341

00:41:34.858 --> 00:41:38.329

Liz Hand, CFP®: Picturing yourself as a pop can.

342

00:41:38.380 --> 00:41:40.349

Liz Hand, CFP®: and any moment that you feel like

343

00:41:40.490 --> 00:41:42.960

Liz Hand, CFP®: I'm about to have, I'm about to explode.

344

00:41:44.030 --> 00:41:48.080

Liz Hand, CFP®: catching yourself right before that. This is the catch and correct. Catch yourself right before it.

345

00:41:48.110 --> 00:41:51.000

Liz Hand, CFP®: Say, you know what I've got some big emotions right now.

346

00:41:51.180 --> 00:41:54.809

Liz Hand, CFP®: I don't want to get that all over you. I'm going to go. Take a 5 min break. I'll be back.

347

00:41:55.560 --> 00:42:10.840

Liz Hand, CFP®: Give yourself that permission. Go to the bathroom, or you don't even have to be that transparent. I mean, it's your spouse, so you can be that transparent. Maybe it's an employee or someone that you don't, and a client that you don't want to be that transparent with. You can just say you know what I need a bio break.

348

00:42:11.330 --> 00:42:19.719

Liz Hand, CFP®: and then go to the rest. Shake it out, get yourself a drink, reconnect your mind back to your heart, back to your body, get that deep breath

349

00:42:20.010 --> 00:42:21.660

Liz Hand, CFP®: and and move forward.

350

00:42:22.210 --> 00:42:35.439

Liz Hand, CFP®: So just offer that story to you. And thank you so much for the vulnerability of sharing. I have it that there are several people dealing with this at different levels. And I think it's really courageous for you to even surface it as something to talk about.

351

00:42:35.440 --> 00:42:50.059

Eric Walters: I really appreciate it, and thank you for that. The example. I am someone that's emotional,



and I sometimes will catch myself on the verge of tears. All of a sudden it surprises me. And so, being able to be like, Hey, I'll I'll be right back. So that's helpful. Thank you.

352

00:42:50.430 --> 00:42:51.130

Liz Hand, CFP@: Yep.

353

00:42:52.410 --> 00:42:55.139

Liz Hand, CFP@: okay. Let's

354

00:42:55.840 --> 00:42:59.080

Liz Hand, CFP@: give Eric freedom from the spotlight.

355

00:42:59.360 --> 00:43:01.250

Liz Hand, CFP@: And

356

00:43:02.290 --> 00:43:05.820

Liz Hand, CFP@: who else did this bring up something for someone that they would like to be coached around.

357

00:43:22.240 --> 00:43:25.169

Liz Hand, CFP@: So I'm seeing Amy. Your comment there.

358

00:43:25.940 --> 00:43:27.510

Liz Hand, CFP@: I'm curious, with

359

00:43:27.610 --> 00:43:30.470

Liz Hand, CFP@: excited and struggling to bring teammates along.

360

00:43:30.900 --> 00:43:35.150

Liz Hand, CFP@: I've heard this quite frequently in limitless because you get so many good ideas.

361

00:43:35.730 --> 00:43:36.300

Amy Hall: Yeah.

362

00:43:37.330 --> 00:43:39.120

Liz Hand, CFP@: Yeah. Would you like to be coached around it?

363

00:43:39.410 --> 00:43:40.300

Amy Hall: Sure.

364

00:43:41.010 --> 00:43:45.230

Liz Hand, CFP@: Did something come up for you with the conversation I had with Eric that pointed.



365

00:43:46.297 --> 00:43:51.439

Amy Hall: No, not necessarily. You know, like the the 2 partners I work with.

366

00:43:51.837 --> 00:43:52.999

Amy Hall: You know we're

367

00:43:53.920 --> 00:43:56.015

Amy Hall: one of them is

368

00:43:56.590 --> 00:43:59.310

Amy Hall: you know, very experienced older gentleman.

369

00:44:00.360 --> 00:44:02.170

Amy Hall: great at what he does.

370

00:44:03.220 --> 00:44:09.080

Amy Hall: But is we? We struggle with him, sharing his notes and things in our Crm.

371

00:44:11.900 --> 00:44:18.140

Amy Hall: And the younger one, you know, brand new learning, bringing him along, trying to teach him, trying to

372

00:44:18.340 --> 00:44:26.100

Amy Hall: not have him pick up on bad habits of the other. One kind of thing, but a very there.

373

00:44:26.330 --> 00:44:30.990

Amy Hall: I feel they're very unfocused, like. For instance, we have a weekly meeting.

374

00:44:31.330 --> 00:44:42.150

Amy Hall: and one of them, maybe, will show up, maybe does, maybe doesn't. Doesn't let us know until 5 min for the meeting, hey? I'm going to be 1520, 30 min late.

375

00:44:42.730 --> 00:44:44.129

Amy Hall: You know. For me.

376

00:44:44.480 --> 00:44:51.160

Amy Hall: I'm a go-getter. I'm a planner, you know, just like Eric. I over overthink everything right.

377

00:44:51.310 --> 00:44:54.420

Amy Hall: You want to buy something you got to do the research and



378

00:44:54.560 --> 00:44:58.640

Amy Hall: read all of the reviews. And I'm a planner. That's just who I am.

379

00:44:59.515 --> 00:45:00.220

Amy Hall: And

380

00:45:00.500 --> 00:45:01.949

Amy Hall: these guys aren't

381

00:45:02.110 --> 00:45:06.859

Amy Hall: so the whole limitless thought process of you know, being focused.

382

00:45:07.570 --> 00:45:09.919

Amy Hall: turning off all the other noises.

383

00:45:11.020 --> 00:45:23.229

Amy Hall: I understand that I can't teach them. I can help guide and kind of give like ideas and things I've been put in in charge of like building the processes and the procedures. So

384

00:45:23.290 --> 00:45:27.270

Amy Hall: for me it, I struggle with their focus to

385

00:45:27.660 --> 00:45:30.720

Amy Hall: follow the processes and procedures that we're putting together.

386

00:45:30.870 --> 00:45:32.969

Amy Hall: and we would like to grow.

387

00:45:33.090 --> 00:45:38.489

Amy Hall: So there's no way a new advisor could come on with us

388

00:45:38.610 --> 00:45:39.830

Amy Hall: and B

389

00:45:40.440 --> 00:45:48.369

Amy Hall: successful, because the processes and procedures are there. But only half of us are following them or.

390

00:45:48.460 --> 00:45:53.999

Amy Hall: you know keeping things updated in our crm and communicating really, it's communication?

391



00:45:56.320 --> 00:45:57.820  
Amy Hall: I mean, does that make sense.

392  
00:45:58.370 --> 00:45:59.750  
Liz Hand, CFP®: I'm tracking with ya.

393  
00:45:59.750 --> 00:46:00.410  
Amy Hall: Cool.

394  
00:46:01.650 --> 00:46:05.350  
Liz Hand, CFP®: What would be a good outcome of this conversation for you.

395  
00:46:07.990 --> 00:46:09.870  
Amy Hall: you know, I really do think

396  
00:46:11.120 --> 00:46:13.600  
Amy Hall: that the attention.

397  
00:46:13.940 --> 00:46:16.850  
Amy Hall: when we're in meetings from them.

398  
00:46:17.520 --> 00:46:21.840  
Amy Hall: would go really far for me, and I don't know if it's a fact of

399  
00:46:23.240 --> 00:46:31.070  
Amy Hall: I feel like they're not listening or respecting, or, you know, on the same page. I know they want to succeed. I know they do.

400  
00:46:31.580 --> 00:46:34.389  
Amy Hall: But a successful outcome.

401  
00:46:38.020 --> 00:46:39.430  
Amy Hall: show up to the meeting.

402  
00:46:39.900 --> 00:46:42.490  
Amy Hall: I mean, it's on. It's on the calendar.

403  
00:46:42.580 --> 00:46:47.830  
Amy Hall: He doesn't even accept the weekly calendar invite until he gets on the call.

404  
00:46:48.090 --> 00:46:50.450  
Amy Hall: So it's it's like the unknown.

405

00:46:51.760 --> 00:46:55.500

Amy Hall: just, you know. Follow the processes and procedures. I guess that's what I'm

406

00:46:56.100 --> 00:46:58.609

Amy Hall: I'm struggling with is their lack of

407

00:46:58.720 --> 00:47:00.650

Amy Hall: not understanding how important

408

00:47:00.890 --> 00:47:03.710

Amy Hall: those those really are and what we're trying to do.

409

00:47:06.300 --> 00:47:09.709

Liz Hand, CFP®: And what about an outcome in this conversation for you.

410

00:47:13.590 --> 00:47:25.359

Amy Hall: I think I would say kind of I have to see it from their side, too, of why they're not focused, or what it is they're I mean. I know one of them is. He's just always.

411

00:47:25.490 --> 00:47:29.149

Amy Hall: even when we're in the same office. Try and have a conversation

412

00:47:29.930 --> 00:47:34.239

Amy Hall: looking him in the eye, having a conversation. He'll then turn around and, you know.

413

00:47:34.460 --> 00:47:37.930

Amy Hall: go respond to an email. He feels he can

414

00:47:38.090 --> 00:47:44.130

Amy Hall: do 2, 3 things at the same time, and maybe he can, and maybe I have to accept the fact that

415

00:47:44.680 --> 00:47:47.920

Amy Hall: maybe he that's how he can concentrate. But

416

00:47:48.300 --> 00:47:53.100

Amy Hall: for me, I really find that frustrating and kind of disrespectful, actually

417

00:47:54.790 --> 00:47:58.730

Amy Hall: for my outcome. For me today I don't know. Just

418



00:47:58.820 --> 00:48:00.260

Amy Hall: try to accept that

419

00:48:01.180 --> 00:48:05.150

Amy Hall: they are are who they are and lead with lead, with love and

420

00:48:06.190 --> 00:48:08.619

Amy Hall: show. Don't say don't tell.

421

00:48:09.990 --> 00:48:10.879

Amy Hall: I don't know.

422

00:48:10.880 --> 00:48:11.560

Liz Hand, CFP®: Does that feel, Jan.

423

00:48:11.560 --> 00:48:13.080

Amy Hall: My Liz.

424

00:48:13.930 --> 00:48:15.709

Liz Hand, CFP®: Does that feel genuine to you.

425

00:48:16.520 --> 00:48:17.909

Amy Hall: Yeah, I mean.

426

00:48:17.910 --> 00:48:18.550

Liz Hand, CFP®: Love.

427

00:48:19.140 --> 00:48:25.879

Amy Hall: Of course, you know I mean lead with love. You know one of my mottos is elevate others because it'll elevate you.

428

00:48:26.140 --> 00:48:27.140

Amy Hall: So

429

00:48:27.870 --> 00:48:30.060

Amy Hall: I guess it's frustrating that

430

00:48:30.230 --> 00:48:34.320

Amy Hall: I have this whole mindset growth mindset of everything.

431

00:48:34.430 --> 00:48:35.220

Amy Hall: you know.



432

00:48:36.530 --> 00:48:40.319

Amy Hall: Personally, business wise. You know, I've got kids trying to.

433

00:48:40.700 --> 00:48:42.359

Amy Hall: you know, raise kids.

434

00:48:42.470 --> 00:48:43.500

Amy Hall: And

435

00:48:43.530 --> 00:48:44.670

Amy Hall: it's just

436

00:48:46.400 --> 00:48:49.089

Amy Hall: I would love to see more

437

00:48:50.150 --> 00:48:55.010

Amy Hall: leadership from them, too, I guess. And I'm okay. I really do.

438

00:48:55.160 --> 00:49:05.880

Amy Hall: Don't. I don't mind building the process and the procedures. You know. I know I want to grow. I've got my numbers, I know my numbers. I've shown them the numbers, and they're like, hey? That's pretty cool.

439

00:49:06.020 --> 00:49:08.099

Amy Hall: but I don't think they really get.

440

00:49:09.320 --> 00:49:11.309

Amy Hall: If you have, you have to measure it

441

00:49:11.890 --> 00:49:13.239

Amy Hall: in order to.

442

00:49:13.610 --> 00:49:16.190

Amy Hall: Yep. Yeah, you have to measure it in order to manage it.

443

00:49:18.690 --> 00:49:19.360

Liz Hand, CFP®: So am I. Here.

444

00:49:19.360 --> 00:49:20.380

Amy Hall: Very correctable.



445

00:49:20.580 --> 00:49:21.629

Liz Hand, CFP®: What? Sorry. Go ahead.

446

00:49:23.010 --> 00:49:23.849

Amy Hall: Didn't say anything.

447

00:49:24.560 --> 00:49:26.384

Liz Hand, CFP®: Okay, maybe it's somebody else.

448

00:49:27.630 --> 00:49:29.510

Liz Hand, CFP®: am I hearing you say

449

00:49:29.730 --> 00:49:36.029

Liz Hand, CFP®: I've got my numbers. I can do my numbers. I like doing the procedures and processes. I'm going to follow them, no matter what

450

00:49:37.150 --> 00:49:40.010

Liz Hand, CFP®: I'm going to be. Okay. Am I hearing you say that.

451

00:49:40.490 --> 00:49:41.690

Amy Hall: Yeah, I'm gonna.

452

00:49:41.690 --> 00:49:43.640

Liz Hand, CFP®: They don't adopt it. I'm going to be okay.

453

00:49:44.390 --> 00:49:48.380

Amy Hall: That this is true. I'm going to grow with or without them. I would love their help.

454

00:49:49.260 --> 00:49:52.510

Liz Hand, CFP®: So I just want to acknowledge in that what you're saying is

455

00:49:52.940 --> 00:50:01.610

Liz Hand, CFP®: irrespective of their intention, of their discipline, of their following the path that you're chart charting. You're going on the path.

456

00:50:02.420 --> 00:50:03.090

Amy Hall: Yes.

457

00:50:04.450 --> 00:50:06.769

Liz Hand, CFP®: So in that there is a bit of a release

458



00:50:07.290 --> 00:50:08.370  
Liz Hand, CFP®: is what I hear

459

00:50:09.520 --> 00:50:11.039  
Liz Hand, CFP®: to whatever they decide to do.

460

00:50:13.240 --> 00:50:13.980  
Amy Hall: Yes.

461

00:50:14.670 --> 00:50:16.219  
Liz Hand, CFP®: You don't like that. So what does that mean?

462

00:50:16.270 --> 00:50:24.770  
Amy Hall: Well, I mean, yes, I mean, absolutely. I would love to grow exponentially because they're on board and helping with growth.

463

00:50:24.940 --> 00:50:25.890  
Amy Hall: I guess

464

00:50:27.280 --> 00:50:28.490  
Amy Hall: I'll be okay.

465

00:50:29.620 --> 00:50:32.000  
Amy Hall: I would love to be better than okay.

466

00:50:32.450 --> 00:50:36.390  
Amy Hall: And you know the concentrate on other things like bringing on

467

00:50:36.740 --> 00:50:38.390  
Amy Hall: new advisors. And

468

00:50:38.580 --> 00:50:39.309  
Amy Hall: you know.

469

00:50:40.660 --> 00:50:46.139  
Amy Hall: teammates to help, you know, grow bigger, get bigger, get better, too.

470

00:50:46.190 --> 00:50:47.989  
Amy Hall: So yes, I mean.

471

00:50:48.960 --> 00:50:57.790  
Amy Hall: I think I think Jeremy mentioned it earlier. You know we we hear all you know. You see, all



these people that are 3, 4 years into limitless. You're like, man. I want to go work for them.

472

00:50:57.820 --> 00:50:59.999

Amy Hall: I don't want to put in all the hard work.

473

00:51:00.500 --> 00:51:06.149

Amy Hall: And then, especially for me, like I'm putting in all this hard work. But I'm not getting any partnership help

474

00:51:06.520 --> 00:51:11.699

Amy Hall: alongside, so I'm just going to jump ship and go work for somebody who's already got it figured out.

475

00:51:11.720 --> 00:51:14.979

Amy Hall: That's a thought I always have. But I'm happy where I am.

476

00:51:16.220 --> 00:51:18.190

Amy Hall: Sky's the limit where I am.

477

00:51:20.090 --> 00:51:23.539

Liz Hand, CFP®: You probably just had people on the call that are like, call Amy

478

00:51:28.480 --> 00:51:46.280

Liz Hand, CFP®: So I hear a couple of different directions. We can take the conversation. One is this dancing with the idea of going to another firm? And is that really something that you want or not? And just either putting it to rest or exploring. If that's the direction you want to go, that's 1 direction one is this feeling of disrespectful

479

00:51:47.300 --> 00:51:57.430

Liz Hand, CFP®: that we can touch on, and then the other is a direct, relational thing with either. I'm I'm assuming it's the older person, just by the way, that you put that together. But that's an assertion.

480

00:51:57.783 --> 00:52:01.329

Liz Hand, CFP®: That more of the rub is with the older person than the younger person.

481

00:52:01.770 --> 00:52:03.019

Amy Hall: That's true. Yes.

482

00:52:03.020 --> 00:52:03.610

Liz Hand, CFP®: Okay.

483

00:52:03.800 --> 00:52:05.970

Amy Hall: I mean, he's the one who's got the All. The



484

00:52:06.500 --> 00:52:11.039

Amy Hall: he's great in front of clients, great with individuals.

485

00:52:11.090 --> 00:52:18.460

Amy Hall: And he, you know he tells you exactly what it is you want to hear, but there's not a lot of action backing it up at times.

486

00:52:19.720 --> 00:52:21.789

Liz Hand, CFP®: so what do you want to focus on?

487

00:52:21.830 --> 00:52:23.490

Liz Hand, CFP®: Of those 3 options?

488

00:52:24.869 --> 00:52:28.659

Amy Hall: I guess it would probably be just me accepting that

489

00:52:30.640 --> 00:52:31.530

Amy Hall: I'm

490

00:52:32.650 --> 00:52:39.149

Amy Hall: I'm going to have to accept that. They're probably not going to change. And just like with anybody, you can't make people change.

491

00:52:40.074 --> 00:52:41.650

Amy Hall: I just have to

492

00:52:41.790 --> 00:52:42.990

Amy Hall: accept that

493

00:52:44.530 --> 00:52:49.530

Amy Hall: build as easy. Keep it simple, stupid processes and procedures that

494

00:52:50.340 --> 00:52:54.459

Amy Hall: they have no excuse but to follow and stay on board. And.

495

00:52:55.520 --> 00:52:58.310

Amy Hall: like I said, we have a weekly meeting. They're great.

496

00:52:58.390 --> 00:53:01.700

Amy Hall: We always have great conversations and great ideas and



497

00:53:01.810 --> 00:53:03.940

Amy Hall: great next steps. But

498

00:53:04.240 --> 00:53:07.139

Amy Hall: only one of us is doing the next steps.

499

00:53:08.870 --> 00:53:09.460

Liz Hand, CFP®: Okay.

500

00:53:10.840 --> 00:53:12.747

Liz Hand, CFP®: I still hear that as a different

501

00:53:13.604 --> 00:53:23.349

Liz Hand, CFP®: do you want to go into the way that you feel at those meetings? And some of the assertions that you're making that I'm hearing. Or do you want to go into

502

00:53:24.920 --> 00:53:26.100

Liz Hand, CFP®: Can't change them.

503

00:53:26.820 --> 00:53:27.910

Amy Hall: Can't change them.

504

00:53:28.240 --> 00:53:28.920

Liz Hand, CFP®: Okay.

505

00:53:29.470 --> 00:53:32.010

Liz Hand, CFP®: what's hard for you about not changing others?

506

00:53:36.020 --> 00:53:41.660

Amy Hall: Well, I think it probably has a lot to do with. I have a Bfg. A big fucking goal.

507

00:53:42.670 --> 00:53:44.620

Amy Hall: And I would really

508

00:53:44.680 --> 00:53:47.920

Amy Hall: be so much easier if they were on board.

509

00:53:48.570 --> 00:53:52.500

Amy Hall: So I think that's probably a lot of what my

510

00:53:53.290 --> 00:53:59.880



Amy Hall: hesitancy and frustration is with them is man. If we were all working

511

00:54:01.840 --> 00:54:02.970

Amy Hall: focused

512

00:54:04.080 --> 00:54:05.340

Amy Hall: optimally.

513

00:54:06.110 --> 00:54:07.309

Amy Hall: it wouldn't be a problem.

514

00:54:08.830 --> 00:54:09.899

Liz Hand, CFP®: So you're the governor.

515

00:54:10.320 --> 00:54:11.580

Amy Hall: Yeah, yeah.

516

00:54:12.220 --> 00:54:16.720

Amy Hall: I think that's the hardest thing for me. It's like, I've got a big goal. Can I get there by myself?

517

00:54:16.840 --> 00:54:20.000

Amy Hall: Yes, maybe, but I know that if

518

00:54:20.590 --> 00:54:23.650

Amy Hall: we could, 3 of the 3 of us work together

519

00:54:23.870 --> 00:54:30.029

Amy Hall: and we are, it's not like they're slacking, and they don't care. They just aren't as focused as I would

520

00:54:30.460 --> 00:54:35.270

Amy Hall: is maybe okay. There you go. Maybe they're not as focused as me, and I resent that. Maybe.

521

00:54:35.690 --> 00:54:36.220

Liz Hand, CFP®: Okay.

522

00:54:36.720 --> 00:54:38.010

Liz Hand, CFP®: Why do you resent that.

523

00:54:40.920 --> 00:54:42.070

Amy Hall: Cause.



524

00:54:42.380 --> 00:54:49.249

Amy Hall: If one succeeds we all succeed. I'm not saying that I'm carrying them, or they're carrying me.

525

00:54:49.810 --> 00:54:51.179

Amy Hall: but I would I would. I don't know.

526

00:54:51.920 --> 00:54:52.810

Amy Hall: I don't know.

527

00:54:54.750 --> 00:54:56.290

Liz Hand, CFP®: What is it keeping you from.

528

00:55:00.180 --> 00:55:02.580

Amy Hall: the the massive growth that we're

529

00:55:02.690 --> 00:55:03.800

Amy Hall: trying for.

530

00:55:04.410 --> 00:55:05.780

Liz Hand, CFP®: And why is that important to you.

531

00:55:08.019 --> 00:55:12.930

Amy Hall: It's important to me, because part of my Bfg is to build

532

00:55:13.320 --> 00:55:14.830

Amy Hall: gather assets.

533

00:55:15.080 --> 00:55:28.340

Amy Hall: And then in the 3 in 3 years to basically just nurture those assets. So looking for growth these next 3 years, and then just maintain for a couple of years.

534

00:55:28.360 --> 00:55:29.470

Amy Hall: Well, I

535

00:55:29.840 --> 00:55:30.980

Amy Hall: I plan on

536

00:55:31.620 --> 00:55:34.399

Amy Hall: kind of go on, not really part time, but

537

00:55:34.480 --> 00:55:36.060



Amy Hall: not full time.

538

00:55:37.130 --> 00:55:37.840

Liz Hand, CFP®: Okay.

539

00:55:44.830 --> 00:55:45.740

Amy Hall: What's that?

540

00:55:45.960 --> 00:55:48.639

Liz Hand, CFP®: How come? How come you want to go home? Part time?

541

00:55:48.640 --> 00:55:59.769

Amy Hall: Yeah. So my husband and I are dreaming of, we're not dreaming. It's gonna happen in 3 years when our youngest daughter graduates High School. We're going to buy a sailboat and

542

00:55:59.900 --> 00:56:01.110

Amy Hall: sail around for a bit

543

00:56:02.710 --> 00:56:04.410

Amy Hall: sabbatical for him.

544

00:56:04.920 --> 00:56:06.969

Amy Hall: but not for me. I plan on working.

545

00:56:07.440 --> 00:56:09.610

Amy Hall: continuing to service clients and

546

00:56:10.150 --> 00:56:14.350

Amy Hall: make it back into town 2, 3, 4 times a year.

547

00:56:15.410 --> 00:56:17.610

Amy Hall: So yeah, that's that's the

548

00:56:17.760 --> 00:56:20.230

Amy Hall: that's the reason that's the Bfg.

549

00:56:20.520 --> 00:56:21.290

Liz Hand, CFP®: Awesome.

550

00:56:22.910 --> 00:56:24.299

Liz Hand, CFP®: Do you spend time



551  
00:56:24.440 --> 00:56:26.399  
Liz Hand, CFP®: holding that vision every day.

552  
00:56:26.540 --> 00:56:27.270  
Amy Hall: Yes.

553  
00:56:27.770 --> 00:56:31.539  
Liz Hand, CFP®: Awesome you have like a vision. How do you? How do you get into that space?

554  
00:56:31.650 --> 00:56:37.670  
Amy Hall: Yeah, the vision. You know, my husband and I talk about it quite often. I mean, we have

555  
00:56:37.900 --> 00:56:39.740  
Amy Hall: little things around the house like the

556  
00:56:39.770 --> 00:56:45.420  
Amy Hall: the kids want to go do something, push a button that says, sorry can't afford that. I mean, we can. But.

557  
00:56:46.100 --> 00:56:48.810  
Amy Hall: Or saving for other things. So yeah, I mean, it's a constant.

558  
00:56:48.880 --> 00:56:55.809  
Amy Hall: you know, conversation in in our lives. Yes, we have a vision board that's got a picture of a boat, and

559  
00:56:55.890 --> 00:57:01.389  
Amy Hall: you know the savings goals and what we have to do today to get there in 3 years. And

560  
00:57:01.520 --> 00:57:02.700  
Amy Hall: so. Yes, it's

561  
00:57:02.710 --> 00:57:06.040  
Amy Hall: it's constant a constant reminder for for me.

562  
00:57:06.420 --> 00:57:07.010  
Liz Hand, CFP®: Okay.

563  
00:57:08.490 --> 00:57:11.339  
Liz Hand, CFP®: just a small tweak to the words.

564

00:57:12.894 --> 00:57:15.719

Liz Hand, CFP®: Find a different way to express. Can't afford that.

565

00:57:16.830 --> 00:57:18.560

Amy Hall: Well, that's for the kids. We can't afford that.

566

00:57:18.560 --> 00:57:27.089

Liz Hand, CFP®: Well, yeah, but and there's also saying out loud, and a mindset piece of that is every time you say it, you confirm it to yourself, even though I know the logic behind.

567

00:57:27.090 --> 00:57:27.530

Amy Hall: Hear you.

568

00:57:27.530 --> 00:57:28.680

Liz Hand, CFP®: I'll need to wait a second.

569

00:57:28.920 --> 00:57:33.829

Amy Hall: Yeah, I'll I'll reword that and say, sorry. Can you circumnavigate the globe with that.

570

00:57:33.830 --> 00:57:34.970

Liz Hand, CFP®: Does that help?

571

00:57:35.170 --> 00:57:38.310

Liz Hand, CFP®: We've got other priorities something like that.

572

00:57:38.520 --> 00:57:39.010

Amy Hall: There you go!

573

00:57:39.010 --> 00:57:42.429

Liz Hand, CFP®: We've got our big vision. Can't wait to feel that water

574

00:57:43.990 --> 00:57:45.090

Liz Hand, CFP®: so

575

00:57:47.520 --> 00:57:49.140

Liz Hand, CFP®: so they don't get on board.

576

00:57:50.560 --> 00:57:54.509

Liz Hand, CFP®: and you keep experiencing the same of what you had.

577

00:57:54.620 --> 00:57:55.199

Liz Hand, CFP®: I've got your.



578  
00:57:55.200 --> 00:57:58.740  
Amy Hall: Deal is, yeah, there's there's no drive

579  
00:57:59.130 --> 00:58:03.340  
Amy Hall: for them to. I mean, if if I ask them to do something they'll get it done.

580  
00:58:04.350 --> 00:58:05.930  
Amy Hall: Not proactive with

581  
00:58:06.560 --> 00:58:07.970  
Amy Hall: doing things.

582  
00:58:07.980 --> 00:58:09.340  
Amy Hall: I guess, is another.

583  
00:58:09.770 --> 00:58:10.590  
Liz Hand, CFP®: Sure I mean.

584  
00:58:10.590 --> 00:58:13.030  
Amy Hall: He'll get it done if I ask him to. But I have to.

585  
00:58:13.160 --> 00:58:14.950  
Amy Hall: I have to ask. I shouldn't have to ask.

586  
00:58:15.770 --> 00:58:21.319  
Liz Hand, CFP®: Well, and my reflection to you in that is the vision that you have. The Bfg is

587  
00:58:21.860 --> 00:58:22.790  
Liz Hand, CFP®: for you.

588  
00:58:23.300 --> 00:58:31.130  
Liz Hand, CFP®: and so they're not attached to that vision. They can't feel the sailboat or the wind in their hair or the water. They can't picture what it's going to be like when they're

589  
00:58:32.060 --> 00:58:36.329  
Liz Hand, CFP®: youngest is out of the home like that's that's all personal to you, right?

590  
00:58:36.550 --> 00:58:43.870  
Liz Hand, CFP®: And so is there? Is there a way that you can cast the vision that encourages that. That's a question I have that you don't have to answer here.



591

00:58:43.880 --> 00:58:46.630

Liz Hand, CFP®: Maybe that's 1 that you take to a practice management call.

592

00:58:48.510 --> 00:58:50.920

Liz Hand, CFP®: But the other question I have is

593

00:58:51.820 --> 00:58:58.979

Liz Hand, CFP®: so what? So they don't grab on. They don't follow. They don't. I mean they do, but it's slow, and you're the one pulling.

594

00:58:59.460 --> 00:59:01.329

Liz Hand, CFP®: Can you reach your Bfg.

595

00:59:02.560 --> 00:59:03.250

Amy Hall: Yes.

596

00:59:04.460 --> 00:59:09.500

Liz Hand, CFP®: So it doesn't actually matter if they come along with speed or are sluggish.

597

00:59:10.110 --> 00:59:11.839

Amy Hall: It doesn't matter. No.

598

00:59:11.840 --> 00:59:12.490

Liz Hand, CFP®: Okay.

599

00:59:14.000 --> 00:59:21.219

Amy Hall: And then on the note of how can I relay that to them? You know we we have quarterly and

600

00:59:21.250 --> 00:59:25.689

Amy Hall: annual goals of, you know increasing numbers of plans and

601

00:59:25.870 --> 00:59:26.939

Amy Hall: clients, and

602

00:59:27.150 --> 00:59:31.130

Amy Hall: you know we have the ideal client conversation, and

603

00:59:31.470 --> 00:59:34.729

Amy Hall: you know, especially now, when we're in their gathering

604

00:59:35.390 --> 00:59:37.329



Amy Hall: of assets, it's kind of a

605

00:59:38.130 --> 00:59:40.560

Amy Hall: we're not. We don't. We don't just want anybody. We want.

606

00:59:40.990 --> 00:59:43.760

Amy Hall: Ideal client that will help

607

00:59:43.830 --> 00:59:45.610

Amy Hall: build upon, too. So

608

00:59:46.090 --> 00:59:47.050

Amy Hall: yes, and.

609

00:59:47.050 --> 00:59:57.020

Liz Hand, CFP®: That's the how again for them, but not necessarily the why. So until they have something that they're drawn towards, they're not going to have the same momentum as you, but what I heard you say is.

610

00:59:57.210 --> 00:59:59.059

Liz Hand, CFP®: no matter what they do.

611

00:59:59.220 --> 01:00:00.490

Liz Hand, CFP®: I'm on that boat.

612

01:00:01.200 --> 01:00:01.970

Amy Hall: True.

613

01:00:01.970 --> 01:00:04.799

Liz Hand, CFP®: And I also picture you still holding on to them.

614

01:00:04.860 --> 01:00:07.250

Liz Hand, CFP®: That's the weight that's the resistance that you feel.

615

01:00:08.100 --> 01:00:08.440

Amy Hall: True.

616

01:00:08.440 --> 01:00:11.059

Liz Hand, CFP®: Invitation to you is, what does it look like like this?

617

01:00:14.240 --> 01:00:15.400

Amy Hall: Letting them go.



618

01:00:16.790 --> 01:00:17.979

Liz Hand, CFP®: I don't know what that means.

619

01:00:17.980 --> 01:00:19.022

Amy Hall: I don't either.

620

01:00:19.370 --> 01:00:23.630

Liz Hand, CFP®: I'm not. I'm not actually saying I'm not giving advice on that. I'm just saying like

621

01:00:24.260 --> 01:00:30.400

Liz Hand, CFP®: you've just told me. You don't need them to succeed towards this, and yet you're still holding them accountable

622

01:00:30.670 --> 01:00:32.260

Liz Hand, CFP®: as if you are.

623

01:00:32.490 --> 01:00:35.430

Liz Hand, CFP®: And so it sounds like you're the one that's suffering in this, not them.

624

01:00:36.310 --> 01:00:36.920

Amy Hall: True.

625

01:00:37.330 --> 01:00:39.809

Amy Hall: Yeah. And I know that. I mean, I'm I'm

626

01:00:40.670 --> 01:00:44.760

Amy Hall: like, I said they. They want to succeed. It's not an option where you know

627

01:00:44.910 --> 01:00:49.910

Amy Hall: they can go or I can go. It's you know, we're we're in this for the long haul. And sure, yeah.

628

01:00:50.080 --> 01:00:53.519

Amy Hall: it's where we both. It's where we all need to be. It's just

629

01:00:53.720 --> 01:00:56.320

Amy Hall: like I said. I have to accept the fact that

630

01:00:56.930 --> 01:00:59.359

Amy Hall: I wanted a little more than they do, probably.

631



01:00:59.370 --> 01:01:00.419  
Amy Hall: and that's really.

632  
01:01:00.670 --> 01:01:02.370  
Amy Hall: I guess the takeaway.

633  
01:01:05.270 --> 01:01:08.769  
Liz Hand, CFP®: So sit with that. See how you'd like to relate to that

634  
01:01:08.810 --> 01:01:11.369  
Liz Hand, CFP®: from a leadership perspective. You can also

635  
01:01:11.510 --> 01:01:13.960  
Liz Hand, CFP®: ask questions like, Hey, I notice.

636  
01:01:14.390 --> 01:01:17.720  
Liz Hand, CFP®: I asked you to do this, and it didn't happen. What am I missing.

637  
01:01:18.350 --> 01:01:24.954  
Liz Hand, CFP®: or, you know, just stir up other conversation, too. I'm happy to continue this if you want to post some of it on tribe

638  
01:01:25.790 --> 01:01:29.139  
Liz Hand, CFP®: if you want to get into more of the tactics of how to approach the conversation

639  
01:01:29.350 --> 01:01:30.110  
Liz Hand, CFP®: so.

640  
01:01:30.390 --> 01:01:31.110  
Amy Hall: Thanks. Liz.

641  
01:01:31.450 --> 01:01:33.480  
Liz Hand, CFP®: Absolutely was that helpful.

642  
01:01:33.640 --> 01:01:34.420  
Amy Hall: It was.

643  
01:01:36.040 --> 01:01:43.500  
Liz Hand, CFP®: Alright. I'm gonna take Amy off of spotlight, and I'm going to look at the chat here just a moment.

644  
01:01:53.930 --> 01:02:01.009

Liz Hand, CFP®: Someone offered just privately for you, Amy, if you haven't considered hubbly or Crm workflows that might be helpful.

645

01:02:01.210 --> 01:02:02.910

Amy Hall: Yeah, we do. We have

646

01:02:03.540 --> 01:02:05.379

Amy Hall: a Crm, we use workflows.

647

01:02:07.820 --> 01:02:08.920

Liz Hand, CFP®: Okay.

648

01:02:09.350 --> 01:02:10.680

Liz Hand, CFP®: So

649

01:02:11.330 --> 01:02:17.440

Liz Hand, CFP®: who wants to go next? Got a lot of twos happy to do you know 1 1 to one conversations here?

650

01:02:18.360 --> 01:02:19.250

Liz Hand, CFP®: Who's it.

651

01:02:20.860 --> 01:02:23.920

Liz Hand, CFP®: Who wants to make this the best last 3rd of the year?

652

01:02:25.790 --> 01:02:27.540

Liz Hand, CFP®: By one conversation

653

01:02:28.040 --> 01:02:29.320

Liz Hand, CFP®: I guarantee it.

654

01:02:33.240 --> 01:02:34.209

Liz Hand, CFP®: or I don't.

655

01:02:35.590 --> 01:02:36.430

Liz Hand, CFP®: you know.

656

01:02:36.530 --> 01:02:37.590

Liz Hand, CFP®: open to it.

657

01:02:40.090 --> 01:02:45.460

Liz Hand, CFP®: I see some two's from Mark, and from Jeff, and from David, and Cecilia.



658  
01:02:45.500 --> 01:02:47.670  
Liz Hand, CFP®: from Terry, from Edwin.

659  
01:02:48.060 --> 01:02:50.920  
Liz Hand, CFP®: kind of from Jeremy Christine

660  
01:02:52.190 --> 01:02:53.510  
Liz Hand, CFP®: Bridget.

661  
01:02:55.030 --> 01:02:57.220  
Liz Hand, CFP®: who wants to get coached?

662  
01:03:36.070 --> 01:03:37.150  
Liz Hand, CFP®: Awesome. Jenny.

663  
01:03:53.380 --> 01:03:57.009  
Liz Hand, CFP®: who wants to sing sounds of silence. Anyone anyone.

664  
01:03:58.490 --> 01:03:59.590  
Liz Hand, CFP®: Jeff.

665  
01:04:01.840 --> 01:04:03.500  
Jeff J. Dunn-Bernstein, AIF®: No one wants to hear that.

666  
01:04:20.240 --> 01:04:22.120  
Jeff J. Dunn-Bernstein, AIF®: Looks like you fixed everybody, Liz.

667  
01:04:22.320 --> 01:04:23.840  
Jeff J. Dunn-Bernstein, AIF®: Good work, mission.

668  
01:04:23.840 --> 01:04:25.879  
Liz Hand, CFP®: Magic wand is working today.

669  
01:04:28.440 --> 01:04:30.814  
Bridget Borel: I'll I'll throw something out there.

670  
01:04:32.920 --> 01:04:33.995  
Bridget Borel: I

671  
01:04:35.580 --> 01:04:36.880



Bridget Borel: I may have

672

01:04:37.590 --> 01:04:40.783

Bridget Borel: mentioned to you guys before or not.

673

01:04:41.830 --> 01:04:43.130

Bridget Borel: how

674

01:04:43.160 --> 01:04:45.130

Bridget Borel: I find it challenging.

675

01:04:45.910 --> 01:04:51.048

Bridget Borel: talking with friends and loved ones about

676

01:04:51.660 --> 01:04:55.859

Bridget Borel: you know, striking out on my own with my own firm.

677

01:04:55.930 --> 01:04:58.549

Bridget Borel: like there's a lot they don't get

678

01:04:59.448 --> 01:05:02.040

Bridget Borel: which I've kind of

679

01:05:02.350 --> 01:05:06.279

Bridget Borel: come to let go of, because if someone is accustomed to being

680

01:05:06.910 --> 01:05:10.892

Bridget Borel: an employee for all of their professional life

681

01:05:12.080 --> 01:05:16.269

Bridget Borel: they're just going to be things that they've never experienced

682

01:05:16.460 --> 01:05:17.679

Bridget Borel: as a

683

01:05:18.120 --> 01:05:19.429

Bridget Borel: business owner.

684

01:05:21.240 --> 01:05:22.420

Bridget Borel: and that's okay.

685



01:05:26.200 --> 01:05:32.189

Bridget Borel: I've had a loved one in my life. Recently I I felt like. And maybe

686

01:05:32.732 --> 01:05:34.660

Bridget Borel: maybe this isn't what

687

01:05:34.880 --> 01:05:35.970

Bridget Borel: they mean.

688

01:05:36.492 --> 01:05:39.220

Bridget Borel: But it feels like they're telling me what to do.

689

01:05:39.750 --> 01:05:40.800

Bridget Borel: and

690

01:05:41.670 --> 01:05:44.930

Bridget Borel: I get really defensive.

691

01:05:47.250 --> 01:05:53.509

Bridget Borel: so. I guess what I'm a a question for you, Liz, would be

692

01:05:54.020 --> 01:05:55.857

Bridget Borel: how to navigate

693

01:05:56.520 --> 01:05:59.310

Bridget Borel: I'm I'm trying to stay curious with them

694

01:05:59.840 --> 01:06:04.160

Bridget Borel: and figuring out, you know, sort of what's behind

695

01:06:05.380 --> 01:06:08.380

Bridget Borel: like. Am I interpreting what they're saying correctly?

696

01:06:10.950 --> 01:06:12.470

Bridget Borel: And

697

01:06:12.930 --> 01:06:17.559

Bridget Borel: whatever the truth is like, kind of how to navigate that.

698

01:06:20.030 --> 01:06:22.579

Liz Hand, CFP®: What do you make it mean that they're telling you what to do?



699

01:06:30.670 --> 01:06:37.390

Bridget Borel: so it's feeling like I'm saying I have XY. And Z. Going on this week.

700

01:06:37.620 --> 01:06:39.090

Bridget Borel: And they're saying.

701

01:06:41.280 --> 01:06:45.066

Bridget Borel: Well, really, you should have more client meetings.

702

01:06:45.590 --> 01:06:48.488

Bridget Borel: You're not even in my industry. Let me talk

703

01:06:51.810 --> 01:06:53.690

Bridget Borel: so

704

01:06:54.620 --> 01:07:01.259

Bridget Borel: I think for me it might be some fear of maybe I should have more client meetings.

705

01:07:01.260 --> 01:07:01.960

Liz Hand, CFP®: Hmm.

706

01:07:01.960 --> 01:07:03.455

Bridget Borel: Like, maybe they're right.

707

01:07:04.727 --> 01:07:06.242

Bridget Borel: But also

708

01:07:09.120 --> 01:07:14.477

Bridget Borel: yeah, I'm just not really knowing how to take what they're saying. And

709

01:07:15.710 --> 01:07:19.730

Bridget Borel: I'm trying not to tell my myself a story that isn't really there.

710

01:07:24.960 --> 01:07:28.340

Liz Hand, CFP®: So it sounds like it has a place to land the comments.

711

01:07:29.730 --> 01:07:30.580

Bridget Borel: What do you mean?

712

01:07:31.160 --> 01:07:38.790

Liz Hand, CFP®: Like, if you are completely confident in the number of client meetings that you have in



the structure that you set up, it'd be like, Okay, cool. Thanks.

713

01:07:38.790 --> 01:07:39.410

Bridget Borel: Right.

714

01:07:39.600 --> 01:07:42.510

Liz Hand, CFP®: And you would move on, but it has a place to land or.

715

01:07:42.510 --> 01:07:42.870

Bridget Borel: Sure.

716

01:07:42.950 --> 01:07:44.200

Liz Hand, CFP®: Pause.

717

01:07:44.200 --> 01:07:45.220

Bridget Borel: Sure.

718

01:07:45.220 --> 01:07:46.269

Liz Hand, CFP®: What's thought about.

719

01:07:47.273 --> 01:07:55.959

Bridget Borel: I mean, I'm not even a year in in my end. So it's still very much you know, building time.

720

01:07:56.320 --> 01:08:00.030

Bridget Borel: building and growing, and all of the things to do.

721

01:08:03.780 --> 01:08:04.690

Liz Hand, CFP®: So what?

722

01:08:06.940 --> 01:08:08.889

Bridget Borel: I don't know. Just some

723

01:08:11.390 --> 01:08:12.820

Bridget Borel: lack of

724

01:08:14.130 --> 01:08:17.620

Bridget Borel: certainty or fear

725

01:08:18.250 --> 01:08:19.540

Bridget Borel: of, you know.

726



01:08:20.490 --> 01:08:22.649  
Bridget Borel: fear of failure, basically.

727  
01:08:29.950 --> 01:08:32.748  
Bridget Borel: I also don't like being told what to do.

728  
01:08:33.069 --> 01:08:34.349  
Liz Hand, CFP®: Oh, yeah. How? Come?

729  
01:08:37.390 --> 01:08:39.750  
Bridget Borel: well, by, at least

730  
01:08:39.779 --> 01:08:42.104  
Bridget Borel: with regard to

731  
01:08:46.010 --> 01:08:49.469  
Bridget Borel: like someone who doesn't know the industry, or

732  
01:08:50.260 --> 01:08:56.079  
Bridget Borel: how my business is run, or how how any business in this industry is run.

733  
01:08:57.630 --> 01:09:01.639  
Bridget Borel: It so it it felt like mansplaining in a way.

734  
01:09:05.149 --> 01:09:06.645  
Bridget Borel: I'm like, please stop!

735  
01:09:11.470 --> 01:09:16.054  
Liz Hand, CFP®: So I noticed that there's like 2 directions. We can go with. This. One is

736  
01:09:16.660 --> 01:09:18.470  
Liz Hand, CFP®: your relationship to right wrong.

737  
01:09:18.700 --> 01:09:20.569  
Liz Hand, CFP®: and the other is

738  
01:09:21.100 --> 01:09:26.470  
Liz Hand, CFP®: ways like practical ways, to handle this conversation. As it happens.

739  
01:09:27.300 --> 01:09:32.000  
Liz Hand, CFP®: And what you're making it mean, what it could mean, all of that. What do you wanna where do you wanna go.

740

01:09:36.020 --> 01:09:40.080

Bridget Borel: I think more the how to handle this conversation.

741

01:09:41.223 --> 01:09:48.560

Bridget Borel: Or however you put it the second choice, I mean, I I definitely know that I posted in the chat earlier, that

742

01:09:48.850 --> 01:09:50.923

Bridget Borel: for me sometimes my

743

01:09:52.810 --> 01:10:00.650

Bridget Borel: My wanting to be right or not wrong is about you know, feeling worthy.

744

01:10:01.581 --> 01:10:03.888

Bridget Borel: So I know that already.

745

01:10:07.230 --> 01:10:11.789

Liz Hand, CFP®: So what's predictable to happen when that person's like? Well, you should have more meetings in the week.

746

01:10:12.880 --> 01:10:14.429

Bridget Borel: What do you mean? What's predictable?

747

01:10:14.620 --> 01:10:17.189

Liz Hand, CFP®: Like, what's the predictable response that comes out of you?

748

01:10:26.440 --> 01:10:35.300

Bridget Borel: I think how I've dealt with it so far is that you know I have certain things I'm focusing on right now. And

749

01:10:36.880 --> 01:10:38.580

Bridget Borel: You know, growth is

750

01:10:38.790 --> 01:10:42.389

Bridget Borel: growth is something that's laid down over time.

751

01:10:43.167 --> 01:10:46.270

Bridget Borel: And it's not. And I want to have

752

01:10:48.610 --> 01:10:51.029

Bridget Borel: the right client and not just any client.



753  
01:10:52.530 --> 01:10:54.540  
Liz Hand, CFP®: And you say that out loud to this person.

754  
01:10:54.940 --> 01:10:57.769  
Bridget Borel: I have said some of that out loud. Yeah.

755  
01:11:00.870 --> 01:11:01.440  
Liz Hand, CFP®: Okay.

756  
01:11:01.740 --> 01:11:05.250  
Liz Hand, CFP®: So you respond back with

757  
01:11:05.970 --> 01:11:07.130  
Liz Hand, CFP®: the

758  
01:11:07.400 --> 01:11:09.480  
Liz Hand, CFP®: right client. Right? Time.

759  
01:11:09.650 --> 01:11:11.340  
Liz Hand, CFP®: Different way of going about it.

760  
01:11:12.197 --> 01:11:15.700  
Bridget Borel: Yeah, there's that. But also I've been

761  
01:11:16.140 --> 01:11:18.080  
Bridget Borel: toying with this today, like.

762  
01:11:18.090 --> 01:11:19.709  
Bridget Borel: maybe my.

763  
01:11:20.900 --> 01:11:23.869  
Bridget Borel: what my response should be is.

764  
01:11:24.270 --> 01:11:26.109  
Bridget Borel: you know, I notice you.

765  
01:11:26.180 --> 01:11:28.620  
Bridget Borel: You've made these comments like, what is.

766  
01:11:29.340 --> 01:11:31.650



Bridget Borel: what is this about for you like?

767

01:11:34.650 --> 01:11:38.359

Bridget Borel: Are you just in management mode like

768

01:11:38.760 --> 01:11:44.800

Bridget Borel: this is how you talk to employees I don't know like like, is this about you? Or is this about me?

769

01:11:47.220 --> 01:11:47.720

Liz Hand, CFP®: yeah.

770

01:11:47.720 --> 01:11:51.270

Bridget Borel: Something along those lines like trying to get

771

01:11:51.380 --> 01:11:54.939

Bridget Borel: curious about why, it's even

772

01:11:55.290 --> 01:11:56.520

Bridget Borel: a comment.

773

01:11:59.300 --> 01:12:00.520

Bridget Borel: Versus.

774

01:12:02.760 --> 01:12:04.679

Bridget Borel: Sometimes I forget that

775

01:12:05.450 --> 01:12:08.780

Bridget Borel: just because someone asks me a question doesn't mean I have to answer it.

776

01:12:13.240 --> 01:12:30.810

Liz Hand, CFP®: I think in any relationship, we create these relational patterns. And it sounds like it goes a particular way of like this is what I'm doing, you should do it differently. I'm doing it the way that I want to. Well, you're doing it that way like, and it just goes back and forth, and back and forth, and back and forth, and at some point to cut.

777

01:12:30.950 --> 01:12:32.360

Liz Hand, CFP®: cut that pattern.

778

01:12:32.580 --> 01:12:33.899

Liz Hand, CFP®: change the energy.

779



01:12:34.450 --> 01:12:35.280  
Bridget Borel: Right.

780  
01:12:35.280 --> 01:12:36.670  
Liz Hand, CFP®: Are you uncomfortable right now?

781  
01:12:37.220 --> 01:12:38.180  
Liz Hand, CFP®: More.

782  
01:12:39.180 --> 01:12:40.950  
Liz Hand, CFP®: That's a great idea.

783  
01:12:41.170 --> 01:12:42.419  
Liz Hand, CFP®: I'm going to work on that.

784  
01:12:42.900 --> 01:12:43.390  
Bridget Borel: Right.

785  
01:12:43.390 --> 01:12:47.530  
Liz Hand, CFP®: And 1st I'm gonna do these other things. Thanks for the encouragement.

786  
01:12:47.870 --> 01:12:48.780  
Liz Hand, CFP®: See ya.

787  
01:12:49.410 --> 01:12:50.680  
Liz Hand, CFP®: or whatever.

788  
01:12:50.680 --> 01:12:55.560  
Bridget Borel: I'm I'm enjoying some of the comments in the chat.

789  
01:12:57.520 --> 01:12:59.170  
Liz Hand, CFP®: They are, you know

790  
01:12:59.900 --> 01:13:01.890  
Liz Hand, CFP®: they are funny.

791  
01:13:02.010 --> 01:13:03.710  
Liz Hand, CFP®: and also.

792  
01:13:04.140 --> 01:13:08.090  
Liz Hand, CFP®: when we like, it doesn't have to be so heavy.

793

01:13:08.210 --> 01:13:12.790

Liz Hand, CFP®: It doesn't have to mean so much. It can just be their way of relating to you.

794

01:13:12.850 --> 01:13:15.859

Liz Hand, CFP®: and it doesn't like it doesn't have to drag you down.

795

01:13:17.260 --> 01:13:18.609

Liz Hand, CFP®: Cool thanks. Love it!

796

01:13:18.630 --> 01:13:21.079

Liz Hand, CFP®: I love how much you support me! Thank you.

797

01:13:21.910 --> 01:13:22.760

Bridget Borel: Right. See?

798

01:13:22.760 --> 01:13:24.140

Liz Hand, CFP®: See all of the good in it.

799

01:13:28.240 --> 01:13:29.949

Bridget Borel: yeah, that's a good point.

800

01:13:35.730 --> 01:13:36.719

Liz Hand, CFP®: What do you want to do with it?

801

01:13:39.040 --> 01:13:42.729

Bridget Borel: I like the idea of changing the energy cause.

802

01:13:46.090 --> 01:13:52.280

Bridget Borel: one of my one of my thoughts of you know I don't really know

803

01:13:53.050 --> 01:14:02.731

Bridget Borel: what is going on for this person when they're saying, This is are they just being playful? And I'm taking like, I'm taking you wrong?

804

01:14:03.830 --> 01:14:07.350

Bridget Borel: so, yeah, I think the changing, the energy

805

01:14:09.400 --> 01:14:11.940

Bridget Borel: keeping it lighter, at least for myself.

806

01:14:14.790 --> 01:14:15.550



Liz Hand, CFP®: yeah.

807

01:14:16.410 --> 01:14:17.730

Liz Hand, CFP®: create what you want?

808

01:14:18.210 --> 01:14:19.160

Bridget Borel: Oh.

809

01:14:24.870 --> 01:14:25.620

Bridget Borel: cool!

810

01:14:27.020 --> 01:14:27.880

Liz Hand, CFP®: Did that help?

811

01:14:27.880 --> 01:14:29.389

Bridget Borel: Yes, thank you.

812

01:14:29.390 --> 01:14:31.640

Liz Hand, CFP®: Awesome thanks for getting coached. Yeah.

813

01:14:48.000 --> 01:14:58.540

Liz Hand, CFP®: that just reminded me of a conversation I had with my husband a couple of years ago, when I was like, I think I want to write a book. He's like, How can you write a book like you haven't done the research for it? And I'm like.

814

01:14:59.195 --> 01:14:59.850

Bridget Borel: And.

815

01:14:59.850 --> 01:15:05.710

Liz Hand, CFP®: Typically that would take me down this path of like. Oh, my gosh! I know I I didn't. I'm not doing it right. And blah blah blah like.

816

01:15:05.860 --> 01:15:09.120

Liz Hand, CFP®: And just in that moment I was like, I don't know. People write books all the time.

817

01:15:09.850 --> 01:15:16.850

Liz Hand, CFP®: and he continued to ask the way he asked questions. And it's okay, like he's allowed to work it out in his brain.

818

01:15:18.690 --> 01:15:22.470

Liz Hand, CFP®: And I'm allowed I'm allowed to have the experience that I want.

819



01:15:30.100 --> 01:15:31.730  
Liz Hand, CFP®: What else? Y'all

820

01:15:36.030 --> 01:15:40.130  
Liz Hand, CFP®: anybody going to the Fpa Conference in Columbus, Ohio? We do. If you are

821

01:15:40.390 --> 01:15:42.149  
Liz Hand, CFP®: post in the chat because I want to meet up

822

01:15:43.190 --> 01:15:44.680  
Liz Hand, CFP®: great state of Ohio.

823

01:15:52.470 --> 01:15:55.129  
Liz Hand, CFP®: Yeah, I love that be who you say you are.

824

01:15:55.800 --> 01:16:01.599  
Liz Hand, CFP®: you know that's an interesting one. Because I I was kind of thinking about that earlier when Eric was sharing about

825

01:16:02.232 --> 01:16:05.309  
Liz Hand, CFP®: like just something that I'm learning right now is

826

01:16:05.520 --> 01:16:06.500  
Liz Hand, CFP®: that

827

01:16:06.600 --> 01:16:10.009  
Liz Hand, CFP®: this I like. I've posted about good girl syndrome.

828

01:16:10.170 --> 01:16:15.760  
Liz Hand, CFP®: and how actually inauthentic. That is because I have opinions I'm not sharing.

829

01:16:16.110 --> 01:16:21.270  
Liz Hand, CFP®: I have something that I believe that I'm I'm actually hiding

830

01:16:21.330 --> 01:16:23.199  
Liz Hand, CFP®: from the people closest to me.

831

01:16:23.650 --> 01:16:30.180  
Liz Hand, CFP®: and in service of like keeping the waters calm in service, of making them think that things are fine.

832

01:16:30.290 --> 01:16:37.271



Liz Hand, CFP®: and what's fascinating about that is that you know I had a conversation with my husband just putting on a stuff on the table today. But,

833

01:16:37.660 --> 01:16:45.419

Liz Hand, CFP®: He said to me, like Liz, I don't get it. We have these, we have these conversations like the the build up conversation. Then we, you know, get into the

834

01:16:45.570 --> 01:16:49.520

Liz Hand, CFP®: not really an argument. Conversation. Kind of an argument I don't know.

835

01:16:49.770 --> 01:16:54.960

Liz Hand, CFP®: and he gets to the end of it, and he's like, I just. I don't get it. It feels like we're fine a lot.

836

01:16:55.490 --> 01:16:57.520

Liz Hand, CFP®: But you're telling me that things are not fine.

837

01:16:58.010 --> 01:16:59.559

Liz Hand, CFP®: like, well, yeah.

838

01:16:59.580 --> 01:17:08.610

Liz Hand, CFP®: that is my defense mechanism. There. It's a big mask that I wear all the time pretending like things are fine, and I'm really freaking good at it.

839

01:17:08.790 --> 01:17:14.294

Liz Hand, CFP®: I got a great smile when I get any political client or political comment coming from a client.

840

01:17:16.150 --> 01:17:17.600

Liz Hand, CFP®: Even though I don't

841

01:17:17.660 --> 01:17:25.729

Liz Hand, CFP®: believe what they're saying or I'm really uncomfortable, or someone wants me to do something, and I see it differently like I have a really

842

01:17:26.030 --> 01:17:28.880

Liz Hand, CFP®: delightful manipulative way of getting around them

843

01:17:29.630 --> 01:17:31.389

Liz Hand, CFP®: by pretending I have no opinion.

844

01:17:34.060 --> 01:17:37.789

Liz Hand, CFP®: and it's not necessarily bad like there's there's a time and place for everything.



845

01:17:38.883 --> 01:17:40.049

Liz Hand, CFP®: Kindness matters.

846

01:17:40.270 --> 01:17:41.420

Liz Hand, CFP®: and

847

01:17:42.950 --> 01:17:45.920

Liz Hand, CFP®: they know that you're pretending. What do you mean by that, Rashani?

848

01:17:50.450 --> 01:17:51.270

Liz Hand, CFP®: That's interesting.

849

01:17:51.270 --> 01:18:01.739

Roshani Pandey: So I think that, like I, I heard the same thing sometimes, and I think that it somehow shows in your body language that you're just trying to calm

850

01:18:01.880 --> 01:18:10.479

Roshani Pandey: the situation. So we think we're pretending so well, they kind of feel this uneasy feeling like they're not completely in agreement.

851

01:18:11.096 --> 01:18:13.330

Roshani Pandey: Things are not that calm.

852

01:18:14.500 --> 01:18:17.970

Liz Hand, CFP®: Yeah, I think I agree with that. Like our.

853

01:18:18.260 --> 01:18:25.500

Liz Hand, CFP®: the what's really going on inside of us does transmit at a very subconscious level for everybody, and whether they're aware of it or not, aware of it.

854

01:18:26.960 --> 01:18:29.649

Liz Hand, CFP®: Depends on how present they are in the conversation, for sure.

855

01:18:32.220 --> 01:18:33.769

Liz Hand, CFP®: That's interesting. Yep.

856

01:18:33.960 --> 01:18:35.609

Liz Hand, CFP®: Alison we talked about that. Remember.

857

01:18:36.350 --> 01:18:40.808

Allison Foulk: Yeah, you caught me last week, I thought, that's interesting to Liz.



858

01:18:41.230 --> 01:18:46.049

Liz Hand, CFP®: I said. When people say that's interesting, that's a deflection of the conversation.

859

01:18:46.420 --> 01:18:48.837

Allison Foulk: I was like. Yes, it is.

860

01:18:52.527 --> 01:18:56.400

Liz Hand, CFP®: Jp, you got them rolling out today all these cracks.

861

01:19:00.140 --> 01:19:03.300

Liz Hand, CFP®: Alright. We got 15 min or so.

862

01:19:03.850 --> 01:19:06.980

Liz Hand, CFP®: Who else would like a shift in their relationship

863

01:19:07.590 --> 01:19:09.160

Liz Hand, CFP®: to the present moment.

864

01:19:31.540 --> 01:19:39.449

Liz Hand, CFP®: Oh, I don't mind. I like I like the playfulness. Where'd you go on vacation? Jp, I don't even know if I've I've I've seen you on camera care to come on camera.

865

01:19:53.850 --> 01:19:56.229

Liz Hand, CFP®: Oh, yeah, we have met before. I do recall

866

01:19:58.250 --> 01:19:59.580

Liz Hand, CFP®: how was vacation.

867

01:20:01.740 --> 01:20:02.830

Liz Hand, CFP®: You're on mute.

868

01:20:12.540 --> 01:20:13.460

JP LaCour: Can you hear me now?

869

01:20:13.610 --> 01:20:15.229

Liz Hand, CFP®: I can. Yes, indeed.

870

01:20:15.510 --> 01:20:18.189

JP LaCour: Vacation was good, went to Puerto Rico.

871



01:20:18.530 --> 01:20:23.600

JP LaCour: not quite what I expected, and kind of scouting it out for family trip later this year, but.

872

01:20:24.690 --> 01:20:25.350

Liz Hand, CFP®: Awesome.

873

01:20:25.350 --> 01:20:29.509

JP LaCour: Doing some multitasking while I'm while I'm listening and watching. So sorry.

874

01:20:29.510 --> 01:20:30.180

Liz Hand, CFP®: Nice.

875

01:20:30.180 --> 01:20:30.866

JP LaCour: Video off.

876

01:20:31.210 --> 01:20:41.209

Liz Hand, CFP®: I love it. You know there's all different levels of engagement. And thank you for participating what? As you come back into work mode. Have you learned from being away.

877

01:20:42.580 --> 01:20:47.959

JP LaCour: Probably best not to schedule vacation right next to a 3 day long.

878

01:20:50.480 --> 01:20:52.240

JP LaCour: Regional meeting

879

01:20:52.760 --> 01:20:54.929

JP LaCour: that I've got to go back into a hotel for.

880

01:20:55.340 --> 01:20:56.050

Liz Hand, CFP®: Okay.

881

01:20:59.570 --> 01:21:00.320

Liz Hand, CFP®: Good.

882

01:21:01.660 --> 01:21:03.750

JP LaCour: Yeah, no, I I just needed it.

883

01:21:04.880 --> 01:21:05.510

Liz Hand, CFP®: Yeah.

884

01:21:06.380 --> 01:21:08.449

JP LaCour: Time to re-energize.



885

01:21:10.700 --> 01:21:11.530

Liz Hand, CFP@: Memphis.

886

01:21:15.850 --> 01:21:16.950

Liz Hand, CFP@: Well.

887

01:21:17.340 --> 01:21:21.100

Liz Hand, CFP@: I'm not gonna stay on here with blank air. I feel like that is

888

01:21:21.330 --> 01:21:24.532

Liz Hand, CFP@: mean someone's got to sing or entertain.

889

01:21:26.190 --> 01:21:33.580

Liz Hand, CFP@: So if that's not gonna happen and nobody wants a shift that they've paid for with limitless, we can just conclude. I mean, that's up to you.

890

01:21:34.200 --> 01:21:41.220

Bridget Borel: Well, can I ask a question? Lens? Sure, since I very sadly was sick last week, and had to miss going to Denver.

891

01:21:41.220 --> 01:21:43.120

Liz Hand, CFP@: Oh, yeah. Fomo. Sorry.

892

01:21:43.120 --> 01:21:44.984

Bridget Borel: Can I ask what

893

01:21:45.780 --> 01:21:49.329

Bridget Borel: everyone's top takeaway was.

894

01:21:50.910 --> 01:21:53.619

Liz Hand, CFP@: Sure. Yeah, anybody want to post it in the

895

01:21:54.390 --> 01:21:59.170

Liz Hand, CFP@: comments, go for it, or if you want to come on, live, you can.

896

01:21:59.720 --> 01:22:02.270

Liz Hand, CFP@: In the meantime I'll share cause.

897

01:22:02.910 --> 01:22:03.620

Bridget Borel: Please.



898

01:22:04.120 --> 01:22:09.109

Liz Hand, CFP®: And Stephanie nailed one of my mindset hiccups

899

01:22:09.160 --> 01:22:10.380

Liz Hand, CFP®: which she keeps

900

01:22:11.790 --> 01:22:14.070

Liz Hand, CFP®: pointing me towards. Which is this like

901

01:22:14.100 --> 01:22:18.379

Liz Hand, CFP®: resistance I have, with just being like the full out retirement coach

902

01:22:19.070 --> 01:22:21.410

Liz Hand, CFP®: with the financial planning team behind me.

903

01:22:22.050 --> 01:22:28.659

Liz Hand, CFP®: and it hit me to a new level this time, and I realized what I am most scared about in just being

904

01:22:28.860 --> 01:22:33.330

Liz Hand, CFP®: like going full out. Liz mode in the world with pleasant wealth.

905

01:22:33.736 --> 01:22:48.909

Liz Hand, CFP®: Is that I'm worried about other financial planners, how they react to me, how other coaches react to me because I'm not then purely financial planning. And then I'm not purely coaching. And so who am I? Which is a place I get myself into quite a bit.

906

01:22:48.960 --> 01:22:53.350

Liz Hand, CFP®: and it really points back to my most deep fear which is not belonging.

907

01:22:53.500 --> 01:22:56.039

Liz Hand, CFP®: And yet I am this innovator.

908

01:22:56.150 --> 01:22:57.350

Liz Hand, CFP®: and so

909

01:22:57.470 --> 01:23:08.189

Liz Hand, CFP®: it doesn't like I'm always pushing the edges of and bringing 2 worlds together. That's how I go about life. And so you can't be fully innovate innovator

910

01:23:09.420 --> 01:23:20.010

Liz Hand, CFP®: bringing new ideas forth if you're scared about the way that people are going to react



to you. So that was that. That was what I was faced with, and it unlocked quite a bit for me.

911

01:23:22.940 --> 01:23:26.709

JP LaCour: I will say the conversation with Amy made me rethink about my own

912

01:23:29.000 --> 01:23:30.940

JP LaCour: the the way I come across.

913

01:23:32.370 --> 01:23:36.660

JP LaCour: One of the reasons I moved firms was

914

01:23:37.200 --> 01:23:38.999

JP LaCour: because I was meeting doubt.

915

01:23:41.340 --> 01:23:44.599

JP LaCour: tired of meetings about meetings and

916

01:23:44.820 --> 01:23:48.973

JP LaCour: not saying that it's to that extent where you guys are all at. But

917

01:23:50.790 --> 01:23:54.810

JP LaCour: I I do wonder, after that conversation, how others take

918

01:23:54.940 --> 01:23:57.279

JP LaCour: some of the comments I make that are

919

01:23:57.480 --> 01:23:59.080

JP LaCour: meant to be

920

01:23:59.930 --> 01:24:01.160

JP LaCour: more more

921

01:24:01.760 --> 01:24:02.520

JP LaCour: light.

922

01:24:03.580 --> 01:24:10.209

JP LaCour: And and in reality I'm you know I I used to be president of a Chamber, and I I would make comments at a meeting, you know.

923

01:24:10.980 --> 01:24:17.320

JP LaCour: I don't understand why these conversations take 20 min when you got the win within the 1st 2 min.



924  
01:24:19.540 --> 01:24:20.290  
JP LaCour: yeah.

925  
01:24:20.660 --> 01:24:21.450  
JP LaCour: So

926  
01:24:21.660 --> 01:24:23.030  
JP LaCour: I think I'm gonna have to

927  
01:24:24.130 --> 01:24:25.300  
JP LaCour: overthink

928  
01:24:26.280 --> 01:24:32.810  
JP LaCour: every once in a while and be okay with overthinking. Just think about how how it's coming across to others.

929  
01:24:33.250 --> 01:24:35.820  
Liz Hand, CFP®: Yeah, I love that self-awareness. Jp, I think

930  
01:24:36.120 --> 01:24:42.739  
Liz Hand, CFP®: the the humble nature of just bringing that to your own attention. That's what mindset work is all about.

931  
01:24:42.780 --> 01:24:50.210  
Liz Hand, CFP®: and each of us come to conversations from a state of being like a natural way of doing things.

932  
01:24:50.350 --> 01:24:53.309  
Liz Hand, CFP®: And so you've now defined what it is that you do.

933  
01:24:53.700 --> 01:25:03.239  
Liz Hand, CFP®: and mindset work is easy, easy, because you just shift out of it, and then you find that you are able to get the same result with less effort.

934  
01:25:03.836 --> 01:25:07.939  
Liz Hand, CFP®: And so I'm I'll be curious to see what you learn as you dig into that.

935  
01:25:08.300 --> 01:25:09.360  
Liz Hand, CFP®: Thanks for sharing.

936  
01:25:14.920 --> 01:25:32.090



Eric Walters: I'll just share Cesarek. I decided not to go to the workshop, because I felt like I had more than enough on my plate to work on, particularly for the virtual one. And for me, that's actually a big step forward to say, enough is enough. You don't need more ideas. You don't need another initiative. Just execute on this stuff.

937

01:25:32.100 --> 01:25:37.410

Eric Walters: And so I hope everyone had a great time. But I actually was really proud of myself to say, that's good.

938

01:25:38.670 --> 01:25:40.400

Liz Hand, CFP®: Congratulations. That's awesome.

939

01:25:58.940 --> 01:26:00.150

Liz Hand, CFP®: 12 min.

940

01:26:00.850 --> 01:26:02.300

Liz Hand, CFP®: What's gonna happen.

941

01:26:04.330 --> 01:26:08.729

Amy Hall: Hey, Liz, I think you should talk about the benefits of taking vacation.

942

01:26:10.170 --> 01:26:11.199

Liz Hand, CFP®: What do you see?

943

01:26:11.700 --> 01:26:12.889

Amy Hall: Well, I mean

944

01:26:15.760 --> 01:26:20.620

Amy Hall: we did a three-week vacation earlier in the year, and my husband works in corporate U.S.A.

945

01:26:21.032 --> 01:26:22.909

Amy Hall: You know he's a manager, and

946

01:26:23.090 --> 01:26:24.310

Amy Hall: he had.

947

01:26:25.380 --> 01:26:34.190

Amy Hall: He came back with such a wide, open thought of you know, everyone needs to just go unplug, step away from it all and

948

01:26:34.490 --> 01:26:38.390

Amy Hall: just get away from it all. It really is recharging.



949  
01:26:38.470 --> 01:26:41.240  
Amy Hall: and can bring a lot of clarity to what

950  
01:26:41.300 --> 01:26:43.719  
Amy Hall: really, truly matters in life when you

951  
01:26:43.760 --> 01:26:45.249  
Amy Hall: unplug and step away.

952  
01:26:45.550 --> 01:26:47.409  
Amy Hall: Yeah. So that that's my thought.

953  
01:26:47.950 --> 01:26:55.350  
Liz Hand, CFP®: And if I may be so bold as to ask, How did that shift your relationship with him as you experienced him, having his own epiphany.

954  
01:26:55.670 --> 01:27:00.319  
Amy Hall: Well, he's so overwhelmed and stressed at work, and it was nice to see him not

955  
01:27:00.610 --> 01:27:01.680  
Amy Hall: totally

956  
01:27:02.600 --> 01:27:11.079  
Amy Hall: balls to the wall, and running around like a chicken with their heads cut off. Kind of thing. So I mean, yeah, your personal relationship's always going to be better when you're not

957  
01:27:11.270 --> 01:27:18.700  
Amy Hall: overwhelmed and consumed by your work, which you know it's majority of our life. But it's not the only thing in life.

958  
01:27:20.580 --> 01:27:22.300  
Liz Hand, CFP®: what about his?

959  
01:27:22.510 --> 01:27:27.780  
Liz Hand, CFP®: The people at work that he related to any shift that you heard him say about those

960  
01:27:28.270 --> 01:27:29.600  
Liz Hand, CFP®: relationships.

961  
01:27:29.600 --> 01:27:36.230  
Amy Hall: Well, he highly encouraged everyone to go. Take a 2 week vacation, just go. I don't care where you go. Just go.

962

01:27:37.000 --> 01:27:37.780

Liz Hand, CFP®: Because.

963

01:27:38.310 --> 01:27:38.930

Amy Hall: So.

964

01:27:40.390 --> 01:27:42.819

Liz Hand, CFP®: It's interesting that you bring that up because I

965

01:27:42.830 --> 01:27:45.119

Liz Hand, CFP®: I hear people with resistance.

966

01:27:45.140 --> 01:27:47.399

Liz Hand, CFP®: you know, with the limitless, like a hundred days off

967

01:27:48.130 --> 01:27:51.929

Liz Hand, CFP®: that component of like. How could I do that? What will my clients think

968

01:27:52.340 --> 01:27:59.580

Liz Hand, CFP®: and notice the permission that was created? And it wasn't you in your limitless mode. It was him in his corporate world.

969

01:27:59.850 --> 01:28:08.850

Liz Hand, CFP®: giving himself that permission, and then notice the ripple effects of that that happened in the different relationships, and I bet he probably couldn't even PIN down all of the ripple effects.

970

01:28:08.880 --> 01:28:11.760

Liz Hand, CFP®: Positive ripple effects of unplugging.

971

01:28:12.440 --> 01:28:13.050

Amy Hall: True.

972

01:28:13.250 --> 01:28:16.249

Amy Hall: Yeah. And it makes you feel like you're so overwhelmed, and

973

01:28:16.260 --> 01:28:21.200

Amy Hall: things won't run without me. When you do step away. You do get that holy crap

974

01:28:21.570 --> 01:28:25.149

Amy Hall: stuff does get done when I'm not around. Kind of feeling sometimes, too. So



975

01:28:26.740 --> 01:28:29.449

Amy Hall: that can be a huge mindset and shift, too.

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01:28:30.900 --> 01:28:34.149

Amy Hall: We all think we're 100% important, important, right?

977

01:28:37.820 --> 01:28:40.130

Liz Hand, CFP®: take ourselves a little less seriously.

978

01:28:44.290 --> 01:28:48.870

Eric Walters: Liz, do you mind if I ask you a follow question? Something you just mentioned? Sure.

979

01:28:51.020 --> 01:28:54.230

Eric Walters: you you said something about mindset.

980

01:28:54.490 --> 01:29:08.780

Eric Walters: and it being I. I don't know if I fully understood it. But you were basically saying, mindset as I understood it, something like acknowledging or kind of bringing awareness to something, and then you said so that you could do something with less energy that I

981

01:29:08.960 --> 01:29:10.089

Eric Walters: I remember it like that

982

01:29:10.110 --> 01:29:11.940

Eric Walters: to talk a little bit more about

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01:29:11.970 --> 01:29:13.519

Eric Walters: what that is, and

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01:29:13.630 --> 01:29:16.999

Eric Walters: how you view what mindset work is, and how to do it.

985

01:29:18.980 --> 01:29:22.840

Liz Hand, CFP®: Yeah. So each of us are protecting against our biggest fears

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01:29:23.210 --> 01:29:26.039

Liz Hand, CFP®: of not being not belonging

987

01:29:26.140 --> 01:29:27.370

Liz Hand, CFP®: unworthy.

988



01:29:29.290 --> 01:29:31.698

Liz Hand, CFP®: one more. I just can't think of it.

989

01:29:32.570 --> 01:29:36.959

Liz Hand, CFP®: And when we do that we have created strategies throughout our life

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01:29:37.750 --> 01:29:40.529

Liz Hand, CFP®: to protect from our worst fear.

991

01:29:40.960 --> 01:29:45.580

Liz Hand, CFP®: So my strategy of fearing that I don't belong is good girl.

992

01:29:46.400 --> 01:29:48.370

Liz Hand, CFP®: It is coming across

993

01:29:48.660 --> 01:29:54.763

Liz Hand, CFP®: and cleaning up around the edge. It's very performative. It's very planning oriented. It's very

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01:29:55.600 --> 01:29:57.190

Liz Hand, CFP®: like I will

995

01:29:57.590 --> 01:29:59.989

Liz Hand, CFP®: delight. As far as like.

996

01:30:00.320 --> 01:30:03.299

Liz Hand, CFP®: I will use my creative energy to make you feel really good.

997

01:30:03.600 --> 01:30:04.879

Liz Hand, CFP®: and that is.

998

01:30:05.570 --> 01:30:11.219

Liz Hand, CFP®: it's good, like I've I'm skilled in those things. I'm a good planner. I'm a great creative. I'm

999

01:30:11.503 --> 01:30:15.719

Liz Hand, CFP®: really good at hosting people like there's a lot of great benefits that come from that.

1000

01:30:16.210 --> 01:30:22.030

Liz Hand, CFP®: but inherently baked within. If I'm approaching that from a place of fear, it takes more energy from me

1001



01:30:22.910 --> 01:30:25.200

Liz Hand, CFP®: if I'm approaching that from a place of

1002

01:30:25.430 --> 01:30:29.330

Liz Hand, CFP®: total trust that I belong, no matter what.

1003

01:30:30.130 --> 01:30:32.599

Liz Hand, CFP®: It takes, much less effort from me.

1004

01:30:32.850 --> 01:30:34.540

Liz Hand, CFP®: much less energy.

1005

01:30:35.730 --> 01:30:37.000

Liz Hand, CFP®: And so.

1006

01:30:37.866 --> 01:30:40.890

Liz Hand, CFP®: you can look at any task that you do

1007

01:30:41.440 --> 01:30:46.519

Liz Hand, CFP®: that you are good at like. What's something that you do, that you're really good at, Eric.

1008

01:30:48.245 --> 01:30:53.919

Eric Walters: I do a really good job taking financial or investment concepts and using analogies

1009

01:30:53.930 --> 01:30:58.180

Eric Walters: to help people understand. And then they'll go. That makes total sense. I've never heard of that one.

1010

01:30:58.860 --> 01:30:59.650

Eric Walters: Yeah, just trans.

1011

01:30:59.650 --> 01:31:00.000

Liz Hand, CFP®: Awesome.

1012

01:31:00.030 --> 01:31:00.730

Eric Walters: 54.

1013

01:31:01.610 --> 01:31:02.820

Liz Hand, CFP®: Yeah. So

1014

01:31:02.880 --> 01:31:05.659

Liz Hand, CFP®: I'm just going to make total assertion, and



1015

01:31:05.680 --> 01:31:13.149

Liz Hand, CFP®: it doesn't have to be right at all. But this would be kind of an example of that. So on one hand, you can take something complex and make it very simple.

1016

01:31:13.210 --> 01:31:19.539

Liz Hand, CFP®: On another hand, you can take something very direct and that you want to say, and

1017

01:31:19.650 --> 01:31:20.890

Liz Hand, CFP®: water it down

1018

01:31:21.550 --> 01:31:23.309

Liz Hand, CFP®: to land lightly on people.

1019

01:31:23.860 --> 01:31:25.201

Eric Walters: Oh, yeah, I told you.

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01:31:26.120 --> 01:31:28.239

Liz Hand, CFP®: To not rock the boat for them as to not like.

1021

01:31:28.240 --> 01:31:28.700

Eric Walters: Sure.

1022

01:31:28.700 --> 01:31:37.069

Liz Hand, CFP®: Generate some sort of reaction. So really great things that can happen. But the amount of energy that you put into a metaphor for a client

1023

01:31:37.300 --> 01:31:44.420

Liz Hand, CFP®: to make a con, a concept more simple versus like trying to figure out the best way to explain this to someone's as to not like

1024

01:31:44.630 --> 01:31:46.629

Liz Hand, CFP®: those are very different energies.

1025

01:31:49.020 --> 01:31:50.990

Liz Hand, CFP®: What do you hear in in my share about that?

1026

01:31:53.299 --> 01:31:59.530

Eric Walters: I hear a framework that you're referring to, that people are protecting themselves against biggest fears.

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01:31:59.550 --> 01:32:03.730



Eric Walters: I am fascinated by frameworks because it seems like a shortcut to life

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01:32:03.750 --> 01:32:12.209

Eric Walters: like Oh, is there like oh! Like some sort of principle, one. So that is super interesting. The idea of creating strategies strikes me as

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01:32:12.240 --> 01:32:14.780

Eric Walters: absolutely true. I can see that in myself.

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01:32:14.980 --> 01:32:19.039

Eric Walters: And then, apparently, you have some method

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01:32:19.070 --> 01:32:24.005

Eric Walters: for applying this to yourself and other people, and that's probably where you get your great questions from.

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01:32:24.950 --> 01:32:39.509

Eric Walters: that it's useful. And it sounds like it's bringing good things out of yourself and other people that you're identifying. So I'm like, this is professional, you know, and it's it's like, if you meet a personal trainer you're like, I don't know how exercise work. And they're like, well.

1033

01:32:39.620 --> 01:32:48.970

Eric Walters: there's these principles. So it sounds like, it sounds like you're it sounds like you have a framework prepared. That's that's really useful. I would love to remember that.

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01:32:50.180 --> 01:33:01.080

Liz Hand, CFP®: Yeah. And some of the the limitless worksheets really point to this, too. So I'm thinking of the one I'm not gonna have the right names of them, but one is like self talk for success.

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01:33:01.140 --> 01:33:10.982

Liz Hand, CFP®: and it is. Alison will probably say this better than me, but it's got like a bunch of different icons like how you relate to time and leverage and different things.

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01:33:11.840 --> 01:33:15.870

Liz Hand, CFP®: inherently baked within. That is this place of like resistance

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01:33:16.110 --> 01:33:18.040

Liz Hand, CFP®: where we are.

1038

01:33:18.370 --> 01:33:20.990

Liz Hand, CFP®: We have some sort of fear attached to

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01:33:21.210 --> 01:33:31.300



Liz Hand, CFP®: using our time a specific way or leveraging other people. What does that mean about us? And so we put a lot of meaning onto it. And that keeps us from actually implementing the things that limitless teaches us to do.

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01:33:32.910 --> 01:33:42.210

Liz Hand, CFP®: But it's just a story. It's just a story that we've created. It's a context that we have approached life with. And you could meet somebody on the street and ask them if they believe the same thing, and they'd be like, no.

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01:33:42.640 --> 01:33:47.690

Liz Hand, CFP®: no, I'm just gonna have. I'm just gonna have that conversation with that person directly like who cares if they don't understand me.

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01:33:47.930 --> 01:33:54.590

Liz Hand, CFP®: Well, that's not the way I operate. But that would be a lot easier sometimes. So anyway, I hope that's

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01:33:55.237 --> 01:33:58.179

Liz Hand, CFP®: Clear and Alison, if you want to iterate any further on

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01:33:58.190 --> 01:33:59.440

Liz Hand, CFP®: particular.

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01:34:01.100 --> 01:34:20.079

Allison Foulk: Yeah, I'm drop dropping the workbook in the chat right now. It's the belief busting workbook. And you just assess your mindset around a particular subject, and then dive into it a little bit deeper, similar to how Liz does on these calls, but it can help you do it privately around any topic.

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01:34:21.450 --> 01:34:23.429

Eric Walters: Awesome. Thank you so much.

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01:34:24.990 --> 01:34:34.150

Liz Hand, CFP®: Yeah. And if you want to, if you wanna like, approach it and try, fill it out and see what lands for you, and then post it in tribe. I can give you some feedback

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01:34:34.470 --> 01:34:35.909

Liz Hand, CFP®: on it directly.

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01:34:37.120 --> 01:34:38.549

Eric Walters: Awesome. Thank you.

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01:34:39.960 --> 01:34:41.260

Liz Hand, CFP®: Absolutely



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01:34:46.300 --> 01:34:47.630

Liz Hand, CFP®: all right, friends.

1052

01:34:47.730 --> 01:34:48.910

Liz Hand, CFP®: it's been a delight.

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01:34:52.210 --> 01:35:13.010

Liz Hand, CFP®: I won't see you next month, because I have a speaking engagement right at the same time as this call. So you will be in with Stephanie going over one of the best lessons, which is the money mindset. I'm bummed that I will miss it with you. But what a great conversation that you'll have on the next 3rd week 3rd Monday. So I'll catch you in November.

