

LIMITLESS Coaching Call Transcript

OCTOBER 7TH, 2024
LIFESTYLE PEAK PRACTICE COACHING CALL
YOUR SUCCESS STORY

89
00:13:31.850 --> 00:13:35.600
Stephanie Bogan: Alright. So we're gonna do something

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00:13:35.690 --> 00:13:43.170
Stephanie Bogan: little bit different. This month. We've been working with you guys as we do each calls trying different forms of engagements and breakouts.

91
00:13:43.310 --> 00:13:46.810
Stephanie Bogan: What I want to talk to you about today is.

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00:13:46.830 --> 00:13:54.419
Stephanie Bogan: what's your success story. We start the year with your big why, what's on your post? It what's at the top of those goals pages

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00:13:54.650 --> 00:14:00.729
Stephanie Bogan: right? And a year from now, 2 years from now, 3 years from now, depending on where you are and what your goals are.

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00:14:00.990 --> 00:14:07.559
Stephanie Bogan: you can and should be one of these success stories. You may already be there relative to the progress that you've made.

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00:14:07.640 --> 00:14:09.030
Stephanie Bogan: You may not.

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00:14:09.930 --> 00:14:15.429
Stephanie Bogan: You see some old faces here you see lots of new ones. You see your peers. You see the guy in the blue shirt

97
00:14:16.060 --> 00:14:18.689
Stephanie Bogan: right? What makes them different than you

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00:14:20.410 --> 00:14:22.550
Stephanie Bogan: are they better? Are they smarter?



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00:14:23.000 --> 00:14:30.860

Stephanie Bogan: No, someone's like Michael Kitsis is brilliant. And I said, well, he is, I said, but he's always been brilliant. So what's different about the last 5 years?

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00:14:32.060 --> 00:14:33.750

Stephanie Bogan: They're like, oh, that's a good point.

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00:14:34.570 --> 00:14:38.959

Stephanie Bogan: right? What's different about Brian or Taylor, or Adam or Christy?

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00:14:40.420 --> 00:14:46.380

Stephanie Bogan: If you've made changes as you've made changes. What is it that made that possible?

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00:14:46.750 --> 00:14:51.699

Stephanie Bogan: And so today's conversation is about, where are you in that growth journey?

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00:14:52.650 --> 00:14:57.650

Stephanie Bogan: Michael's grown. It's not technically twice. He just sent me this chart. It's just under

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00:14:58.053 --> 00:15:03.150

Stephanie Bogan: adam's obviously grown. What? 5 X I think it's in just about 6 years or so, you guys.

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00:15:03.210 --> 00:15:09.069

Stephanie Bogan: you know, when you think about what makes this possible is the conversation I want to have today?

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00:15:09.260 --> 00:15:13.879

Stephanie Bogan: What is it really that creates growth stories like these

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00:15:14.110 --> 00:15:16.300

Stephanie Bogan: like, do you ever just sit there and go? Okay.

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00:15:16.660 --> 00:15:28.300

Stephanie Bogan: I'm sure that's some magic thing that Brian did or Adam did, or Christy did, do you? If for one second, is there a thought in your head that that magic sauce is not available to you?

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00:15:29.210 --> 00:15:31.040

Stephanie Bogan: Crush it now

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00:15:31.890 --> 00:15:40.619

Stephanie Bogan: because it is, we know we've done it hundreds and hundreds and hundreds of times

over the course of my career. You see it all the time in limitless.

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00:15:40.640 --> 00:15:46.310

Stephanie Bogan: and that isn't to make you feel beat up if you're not there yet, because it's a growth journey.

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00:15:46.620 --> 00:16:01.700

Stephanie Bogan: But it is to really kinda smack you a little bit on as we hit. Q. 4, and say, Okay, what is it gonna take for you to really get your growth in gear in a way that is truly aligned with your goals.

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00:16:02.360 --> 00:16:11.450

Stephanie Bogan: So that's really what today's call is about. So as we do that, I want you to ask yourself, honest engines, where are you in your growth journey?

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00:16:11.570 --> 00:16:14.589

Stephanie Bogan: I'm going to kind of give you think life cycle phases.

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00:16:14.970 --> 00:16:21.486

Stephanie Bogan: hey? This is nothing to do with age or experience. It's just about your exposure to marketing.

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00:16:21.980 --> 00:16:30.520

Stephanie Bogan: no idea flailing right? Like I just see people doing things. I know I should do. Stuff. I I may have like talked to a client or a referral here or there.

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00:16:30.570 --> 00:16:43.759

Stephanie Bogan: but I really haven't done anything when it comes to marketing, and you know, for whatever reason, I don't think I have the time I'm intimidated. But you're really in that getting ready to get ready stage.

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00:16:43.880 --> 00:16:51.329

Stephanie Bogan: Great mid stage is okay, like I have. I've generated some clients. I've got some income. I have done some things.

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00:16:51.786 --> 00:17:14.550

Stephanie Bogan: you know, but it's typically right to show up. Be good, advisor, react to some things get some things going, so maybe kind of hit and, miss, but you still don't have sort of. You're not geared that flywheel isn't really turning you're trying to figure it out, if you will, and then think about that 3rd stage, which is, Hey, we are getting some good growth. We are doing things.

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00:17:14.550 --> 00:17:28.755

Stephanie Bogan: but we are ready to turn up the heat and really optimize that. And we right quite haven't quite cracked and good talk today haven't quite cracked. That's a tough one. Haven't quite cracked the secret code. I dare you to try that 1 5 times fast.



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00:17:29.890 --> 00:17:35.030

Limitless Adviser: Hey, Stephanie? Sorry, sorry to interrupt, but would you move your fathom box there.

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00:17:35.030 --> 00:17:36.581

Stephanie Bogan: Oh, I'm sorry. Yes.

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00:17:36.970 --> 00:17:38.209

Limitless Adviser: Thank you very much.

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00:17:38.390 --> 00:17:40.329

Stephanie Bogan: Everyone wants to see that.

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00:17:40.745 --> 00:17:52.440

Stephanie Bogan: You know. Where. Where are you? So let's just take a minute and chat about that a little bit Christian. When you think about your growth journey, where would you? Or is there is sort of a different phase. Where would you put yourself.

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00:17:53.220 --> 00:17:56.610

Christian Battistelli, CFP®: Yeah, mine's been interesting. I think.

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00:17:56.710 --> 00:18:03.860

Christian Battistelli, CFP®: with my big focus has been on cois. But then we had this big M and a opportunity come up. So it kind of shifted gears.

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00:18:04.270 --> 00:18:26.009

Christian Battistelli, CFP®: but it also, I think, gave me more time to nurture the cois a little more, whereas I've finally started to have a couple of them proactively reach out to me to get lunch, or to kind of have that touch point where I haven't have to just constantly follow up and follow up. So I think it's finally just, I think, a little bit of the confidence and the momentum, and just consistently dripping where now it's.

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00:18:26.200 --> 00:18:29.830

Christian Battistelli, CFP®: you know, there's starting to be more opportunity for

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00:18:30.370 --> 00:18:31.060

Christian Battistelli, CFP®: renewal.

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00:18:31.307 --> 00:18:51.130

Stephanie Bogan: Think about that. Yeah, when we think about that runway, right? When we talk about like you start, and then it gears up and then things start to happen like the sprinkles come, and then it starts to write, and then you're at your Adam, and then it just happens so it's good to see you sort of right. So you're sort of in that middle to back in phase where you've laid those tracks. And now it's really.

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00:18:51.130 --> 00:18:51.450
Christian Battistelli, CFP®: Hmm.

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00:18:51.450 --> 00:18:59.868

Stephanie Bogan: Figuring out which ones you're gonna right. Which leverage you're gonna pull. And when you're gonna pull them and then optimizing how you do each of those things.

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00:19:00.730 --> 00:19:10.380

Stephanie Bogan: so there'll be some good conversations for you, for those of you kind of in that phase today, around where and how to focus that we don't get over our skis, which is one of the big

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00:19:10.390 --> 00:19:16.839

Stephanie Bogan: mistakes that we do make when we start to get some momentum we're like, look at me. I can market. Let's do it all.

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00:19:16.880 --> 00:19:19.899

Stephanie Bogan: So those are things to watch out for as well.

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00:19:20.472 --> 00:19:24.710

Stephanie Bogan: Sam, how about you? Where are you in the, in the marketing growth journey.

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00:19:26.845 --> 00:19:35.890

Sam Armour, CFP®, CPA, CIMA®: Well, like I alluded to. Last time we talked I finally gave myself permission to just focus on cois and not get overwhelmed by everything else. So

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00:19:36.411 --> 00:19:42.010

Sam Armour, CFP®, CPA, CIMA®: over the last couple of weeks after the Denver retreat, I've been reaching out to my clients cois.

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00:19:42.060 --> 00:19:49.266

Sam Armour, CFP®, CPA, CIMA®: and that has actually proven to be really fruitful. I think I've got 5 lunches scheduled in the next month or so. So.

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00:19:49.580 --> 00:19:50.569

Stephanie Bogan: Great, so.

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00:19:50.570 --> 00:19:51.320

Sam Armour, CFP®, CPA, CIMA®: It goes.

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00:19:51.840 --> 00:19:54.040

Sam Armour, CFP®, CPA, CIMA®: Yeah. So you have good momentum.

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00:19:54.370 --> 00:19:55.170



Stephanie Bogan: Good. Good.

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00:19:55.310 --> 00:20:09.010

Stephanie Bogan: Yeah. So again, we're gonna talk about that. It's a big part of our conversation today is we don't have to go do a thousand shiny things. It really is right figuring out what's gonna work for you and really following a kind of a stick to it, plan if you will.

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00:20:09.269 --> 00:20:18.359

Stephanie Bogan: So let's just talk a little bit about what that means to each of you. Brian's on the line. You've all seen his face on the camera for the last couple of years. If you've been around.

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00:20:18.440 --> 00:20:35.680

Stephanie Bogan: if you're year one, you've no doubt seen him as well. Brian's gonna tell you a little bit about his story. You've all heard from Adam a lot over the last few years, and so, as we shift into 2025, Brian and Jed Levine are gonna be joining us as alumni coaches next year, along with some

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00:20:35.780 --> 00:20:46.649

Stephanie Bogan: special guests and blasts from the past, which is, gonna be super cool. But I wanted him to really talk about his gross story and the journey that, he went on, I think you're gonna find

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00:20:46.690 --> 00:20:51.789

Stephanie Bogan: for many of you. It's really applicable, because it is not a story

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00:20:52.120 --> 00:20:53.600

Stephanie Bogan: of more.

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00:20:54.200 --> 00:20:57.399

Stephanie Bogan: It is a story of better.

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00:20:57.570 --> 00:21:07.329

Stephanie Bogan: It is really easy to the conversation I just had with Christian to get really caught up in the very sexy, shiny, sizzly stuff that is marketing.

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00:21:07.780 --> 00:21:22.549

Stephanie Bogan: and it's very easy not to, because you write your lean back, and you're hesitant. You don't want to make mistakes. That's not the answer either. The answer is to ease in in the ways that work and the ways that work are starting with being brilliant at the basics.

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00:21:22.940 --> 00:21:41.180

Stephanie Bogan: You've heard Adam talk about his story. His 1st 2 X growth had nothing to do with marketing, and it had everything to do with optimizing his practice. Brian's going to share his story, which is similar. So I want you to think about your growth journey in 3 phases.

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00:21:41.500 --> 00:21:50.350



Stephanie Bogan: And, Adam, I think you'll recognize this on the back end, Michael, and I'll tell you guys about it have built out this 3 year roadmap, and it's like in, you know. As you look back, it's also clear

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00:21:50.510 --> 00:21:58.559

Stephanie Bogan: year one is really about optimizing the practice that you have. Let's get rid of the complexity, the dilution, the waste the discounts clients right?

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00:21:58.970 --> 00:22:06.749

Stephanie Bogan: There's there's revenue and income and freedom sitting right there at our feet. If we can do the work of seeing it and acting on it.

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00:22:06.920 --> 00:22:16.980

Stephanie Bogan: Phase 2 is really setting yourself up for success. Right? If you have bigger teams, it's about scaling up. If it's you, it's about people process and platform

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00:22:17.050 --> 00:22:32.849

Stephanie Bogan: to create the kind of leverage you want to work with the people that you want, so that in year 3 everything on that runway is set, and we've been warming it up by year. 3, right? Right? The phone is ringing and things are really starting to groove. And we can really turn on those growth engines.

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00:22:32.870 --> 00:22:39.459

Stephanie Bogan: It's going to be a little bit different in terms of timing for each of you, depending on time, energy, and capital applied.

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00:22:39.500 --> 00:22:47.670

Stephanie Bogan: But I think you're going to find Adam's story and Brian's story, and Christy's story, and Jed's story, and Taylor's story, and Kathy's story

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00:22:47.930 --> 00:22:50.330

Stephanie Bogan: wildly consistent

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00:22:50.490 --> 00:22:53.550

Stephanie Bogan: and in the beginning, wildly boring

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00:22:54.140 --> 00:23:00.160

Stephanie Bogan: when you're sitting down. And you're like I have to do this worksheet. Why does she want me to do this stupid worksheet? I'll just skip ahead and do X, or

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00:23:00.460 --> 00:23:09.879

Stephanie Bogan: there's there is a reason for everything, because it's all a step in that process to right. Put you in those guardrails, to lead you down the road.

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00:23:10.040 --> 00:23:19.550



Stephanie Bogan: to learn as much from our experience as you can, so that you can lead into creating your own learning experiences in terms of how you apply that in your practice. So

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00:23:19.580 --> 00:23:41.049

Stephanie Bogan: I kinda wanna level set there because right, we've covered a lot of ground this year just looking at quarterly check ins. All in all, you guys are feeling really good and solid. Some of you are pacing pretty normal this time of year where you're like, Okay, I'm doing good. But I might, you know, like to have made more progress or be picking it up. This is that tune up moment.

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00:23:41.060 --> 00:23:49.280

Stephanie Bogan: right for those of you that are struggling. We're reaching out right. I'll be checking in with all of you. But if you said you were struggling, I will very soon be reaching out.

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00:23:49.320 --> 00:23:51.580

Stephanie Bogan: I see you. There are a couple of you.

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00:23:51.980 --> 00:23:56.049

Stephanie Bogan: Our goal right now is to get really clear and grounded

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00:23:56.420 --> 00:24:06.410

Stephanie Bogan: on what is really going to create the growth that we want, both in terms of our mindset and our headspace. How are we thinking about it and approaching it

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00:24:06.880 --> 00:24:26.569

Stephanie Bogan: and our methods. What are we focusing on? How are we executing? Right? Are we doing that in ways that work? So with that, Brian, I'm going to turn it over to you, Adam. Obviously you've had a very similar story. Feel free to jump in, as you always do. Right, because your experience, you know, as you've you know. Think about it through. This lens is good as well. So, Brian.

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00:24:27.410 --> 00:24:28.420

Stephanie Bogan: all yours.

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00:24:28.540 --> 00:24:35.629

Brian Voss: Thanks, Stephanie and I. I almost asked Stephanie if she really wanted me on this call, because my journey hasn't been about growth

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00:24:35.670 --> 00:24:51.910

Brian Voss: and yet growth happened anyway, in our practice. So I was thinking about this. I've heard Adam sometimes described as the guy with the niche. I think I would. I would describe our practices. The person who tries to simplify everything so like the guy who simplifies is what I've really done.

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00:24:51.910 --> 00:25:06.179

Brian Voss: And ironically, that's what's led to growth. So a quick background on me, I took over a practice. I had my own clients, but I took over a practice where 2 advisors were retiring. We were basically going to take 3 people's worth of work and put it on the shoulders of one person.



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00:25:06.180 --> 00:25:28.220

Brian Voss: and I had no choice but to simplify every part of our practice. I had to make sure we had standard operating procedures. I had to do all of the boring stuff and part of that really, honestly, what I started with was stripping away everything and really asking when I met with clients really observing what is the most important thing to our clients. What are the questions that we consistently get?

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00:25:28.220 --> 00:25:37.470

Brian Voss: How can we deliver on those things as well as possible? And for me a big part of the journey was identifying those things

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00:25:37.490 --> 00:25:47.240

Brian Voss: that would help to create space so that we could get to the other important things in the future. So I'll give you. A real world example of that was we had to implement surge

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Brian Voss: it was something that I just put on the list right in the beginning, as the most important thing we could do, because implementing surge in our practice

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00:25:55.350 --> 00:26:18.360

Brian Voss: while it was going to concentrate our efforts and make us really focused during surge was going to create space when surge was done for us. To then focus on, how are we going to improve standard operating procedures? How are we going to make the practice more efficient. What services are we going to start to add for our clients over time? And so a big part of my journey. I mean, obviously, if we talk within limitless language like a big part of it first, it was just understanding what my values were

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00:26:18.360 --> 00:26:34.460

Brian Voss: getting really clear on what my goals were getting that postcard, post-it note business plan written down, you know, for me. It was I wanted to generate over a million dollars in revenue. I wanted to take Fridays off, and I wanted to enjoy the work I was doing. Not feel like my hair was on fire to get all of those things done.

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00:26:34.600 --> 00:26:41.730

Brian Voss: And I realized if I wanted to do those 3 things, the very 1st step in the process was creating space. And for me that meant surge meetings.

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00:26:41.750 --> 00:26:51.189

Brian Voss: Now, once we implemented surge and I'll again. I always want to be honest and transparent with the group. Surge was hard in the beginning for me and my team. In fact, it was so hard

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00:26:51.270 --> 00:26:57.819

Brian Voss: that after 2 surges we stopped calling it surge, because anytime we would use the word. My team.

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00:26:57.820 --> 00:26:58.465
Stephanie Bogan: Triggering.

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00:26:59.110 --> 00:27:05.270

Brian Voss: Like, literally, they're like, Oh, like, sir, just come like, how about we just call it review season? Is that okay with everyone?

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00:27:05.290 --> 00:27:17.710

Brian Voss: So you know it's it's not a joke. We literally had to stop calling it surge. It was so hard in the beginning. And now we have spring review, season and summer review, season and fall review season. But what the office learned.

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00:27:17.710 --> 00:27:20.109

Stephanie Bogan: Right? Would your? Would your team go back.

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00:27:20.550 --> 00:27:22.350

Brian Voss: To to calling it surge, or to go back.

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00:27:22.791 --> 00:27:24.999

Stephanie Bogan: To life, pre review, season.

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00:27:25.000 --> 00:27:45.570

Brian Voss: Never in a million years would my team go back to doing it without review, season, without surge, not even close. In fact, now a few years into it. I think if you ask the team, they would say, we don't have any idea how we operated before surge. We don't know how we got the work done. We don't know how we service the clients. It doesn't even make sense to the team now to operate any other way.

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00:27:45.975 --> 00:27:52.619

Brian Voss: So in our office, you know, I'm gonna summarize it so we can leave as much room for questions as possible. We identified what was important.

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00:27:52.660 --> 00:27:57.839

Brian Voss: We use surge as the lead domino that we really thought would allow all the other growth to happen.

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00:27:57.960 --> 00:28:16.009

Brian Voss: Once Surge got rolling into place that created the space we needed to improve our business, and then every time in between surge meetings and surge review cycles, we would find a white, a way to add to our practice, whether it was improving us a step in the process, adding efficiency, adding a new tool, adding a new service

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00:28:16.410 --> 00:28:29.830

Brian Voss: And the whole idea for us was to simplify. It was to make things easier. There was no desire to add growth, and, as you know, once you start executing exceptionally well on something growth



happens, whether you like it or not.

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00:28:30.163 --> 00:28:48.059

Brian Voss: In the past 6 weeks, just for some perspective in the past 6 weeks I think we've added 6 million dollars in new Aum with 0 outbound marketing just through service work on a year to date basis. We're north of 15 million dollars of new aum this year with 0 outbound marketing. We're not even trying to grow

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00:28:48.402 --> 00:29:03.229

Brian Voss: but again, the the journey for me was once I understood what was important. Then I could identify what activities would create space, to be able to work in the business and on on the business rather than just in the business. It started with surge.

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00:29:03.230 --> 00:29:20.099

Brian Voss: and then it started with listening to clients and doing all the value, adds, like, what are the questions that we most commonly hear? So we can develop good, consistent, repeatable answers to those things. And then how do we deliver that in a high quality, repeatable fashion, over and over and over again.

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00:29:20.220 --> 00:29:24.530

Brian Voss: and what was mind blowing to me was the more we did that for clients.

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00:29:24.570 --> 00:29:34.309

Brian Voss: the easier it became for my office, the less it felt like we were working, the happier they were with service. The more referrals we got, the more assets that came in the door.

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00:29:34.350 --> 00:29:45.699

Brian Voss: We were absolutely an office. That was addition by subtraction we added more business, more revenue, more assets, as we focused on our efforts, and actually did less for clients. But deeper.

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00:29:46.223 --> 00:29:49.719

Brian Voss: So again, Stephanie, if you want me to get more specific, I'm happy to do.

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00:29:49.720 --> 00:30:06.180

Stephanie Bogan: Such a well, it's such a good example. You know. Adam had the same experience of you know our our brains tell us like. Oh, you can't do that, and you can't do that. But it is those very things. It is literally leaping before the net appears right. That's why, all those things are on postcards. Darn it!

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00:30:06.752 --> 00:30:11.919

Stephanie Bogan: It's true, right, and it but it is the hardest part, and I say so often.

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00:30:12.245 --> 00:30:18.150

Stephanie Bogan: So I'd be really interested about like how it was for you in terms of your experience in the beginning.



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00:30:18.419 --> 00:30:33.739

Stephanie Bogan: But I was just sharing on the chat. I don't know if you remember it, but I think it was last year you and I had chatted, and you were very clear that one of your goals was to be an alumni coach. You just thought it was the coolest thing that Adam got to share and be that successful and give back.

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00:30:34.100 --> 00:30:44.489

Stephanie Bogan: And so what I was sharing with the group when you were talking is when I 1st reached out to you. Your 1st response wasn't yes, of course your 1st response was, Oh, my gosh! I'm so excited! And

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00:30:44.998 --> 00:30:48.050

Stephanie Bogan: I need to see if I can do that without giving up my space.

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00:30:48.560 --> 00:30:50.488

Stephanie Bogan: And I was like so proud

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00:30:51.318 --> 00:30:59.970

Stephanie Bogan: because truly, every time you add so what you heard Brian talk about so so much, you've heard Adam say it in very different ways. But very similar is

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00:31:00.180 --> 00:31:10.549

Stephanie Bogan: focus and discipline, focus and discipline. Right? It's not that more is better, it is that better is better. It's what are those few things you can do right now

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00:31:10.610 --> 00:31:22.559

Stephanie Bogan: to optimize your practice. That, you've been putting off like, you know, if there's a fee increase or a profitability analysis, you at least need to look at, or some clients

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00:31:22.690 --> 00:31:34.079

Stephanie Bogan: right like you inherently have a sense that you may need to take a look at some of those things, and the question is, are you committed enough to your goals to actually do it? So.

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00:31:34.210 --> 00:31:42.350

Brian Voss: And what I wanna like what I want to put on the table in terms of full transparency I love when you get on calls. And you hear about people that have had success

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00:31:42.650 --> 00:32:07.560

Brian Voss: for the benefit of the group. I want to back up and make sure everyone understands there was a period of time where I had to go into the office every morning at about 4 in the morning, and work from 4 until 7 30, to keep up with things, and then go home and see my family, and then go back into the office. I was working nights. I was working weekends. We had a dozen fee schedules. We had no consistent standard operating procedures. Every day was like a hair on fire. Every morning was Wake up, jump on the work. Hamster wheel, run like crazy. Make no progress



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00:32:07.610 --> 00:32:15.199

Brian Voss: like this, is there? There is no secret sauce. There is understanding what's important and committing to action and then doing it, even when it's tough.

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00:32:15.540 --> 00:32:20.389

Brian Voss: I did not walk into this easy practice where it was like, let's just go from good to great.

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00:32:20.490 --> 00:32:27.940

Brian Voss: It was hard, and and we were not doing well. In the beginning we were doing. We had a good core, a group of clients and a decent amount of revenue.

221

00:32:28.050 --> 00:32:44.000

Brian Voss: but, like it was, it was not simple. It was not just. Oh, if I do 3 things like life is going to be good. I had to break the whole system in order to restart and get it working correctly, and that included like. When when Stephanie said, I asked about commitment schedule, and whether I could do it or not.

222

00:32:44.520 --> 00:32:56.060

Brian Voss: I don't work past 5 30 at night unless it's an absolute emergency, or if I took a bunch of time off in the middle of the day to take care of things for my family, and I just want to get the the work done. I don't work a full Friday

223

00:32:56.140 --> 00:33:05.359

Brian Voss: unless I have to. That's not the way it was like, literally in the summer. I would be in the office from 4 30 in the morning until 7 30, then go home and have breakfast with my family, and then go back to work again.

224

00:33:05.840 --> 00:33:12.009

Brian Voss: It was. It was not easy, it was not smooth. It was an effort. And I just I share that because I think

225

00:33:12.090 --> 00:33:18.069

Brian Voss: some people might hear. Oh, you know, it's it's great. You've doubled your business in the last 4 years you work less, and everything's easy.

226

00:33:18.080 --> 00:33:20.113

Brian Voss: It didn't start that way.

227

00:33:21.030 --> 00:33:28.199

Stephanie Bogan: We always like to say, if it were easy everyone would do it. The trick is, guys, we just make it so complicated.

228

00:33:28.490 --> 00:33:37.750

Stephanie Bogan: And what you hear, Adam, talk about over the years. What you're hearing Brian talk



about is step. One is just undo the things you've done that are getting in your way.

229

00:33:38.480 --> 00:33:58.110

Stephanie Bogan: and I can almost guarantee that we all right time, you know, not leveraging staff, doing \$50 an hour work. You're not using surges, or right, like you inherently know. And then the question is right, what would happen? What would the change be on the other side if you were to put that practice into place. Brian really got

230

00:33:58.140 --> 00:34:08.099

Stephanie Bogan: that when he put surges in place it was going to free up space. It was the reason that he and his team were able to endure the the early execution for them.

231

00:34:08.159 --> 00:34:17.829

Stephanie Bogan: Because, right? The why was bigger than the what if? And that's a really good example, like surges. Aren't 1 size fit? All right? I think Brian does 4 meetings a day.

232

00:34:18.420 --> 00:34:19.920

Stephanie Bogan: Right to 5.

233

00:34:19.920 --> 00:34:20.190

Brian Voss: Got it.

234

00:34:20.199 --> 00:34:27.109

Stephanie Bogan: Right? And then, yeah. And then you get to a point where you're like, I got this, some people never get there. Some people do 6, which is insane to me.

235

00:34:27.696 --> 00:34:28.549

Stephanie Bogan: You know.

236

00:34:28.550 --> 00:34:29.579

Brian Voss: And we we iterate.

237

00:34:29.580 --> 00:34:35.310

Stephanie Bogan: Where I do. 6. But those days I'm like, okay, that was it. I could not do that every day for 20 days.

238

00:34:35.560 --> 00:34:51.669

Brian Voss: And I want to stress what I think the single biggest thing that took the pressure off from my office was. We agreed to take every surge or every project, one at a time. So we said, We're going to do surge. And then at the end of it, we're going to sit as a group and talk about what worked, what didn't work, what we would change.

239

00:34:51.670 --> 00:35:10.910

Brian Voss: you know. So one of the things that we do now like clockwork is. Meetings are only Tuesday,

Wednesday, Thursday, and we only offer 5 time slots each day, 930-11-1234. That's all that's offered. Every time that came out of feedback from my staff, not from me. I was the one who was worried. We've got to be flexible. We've got to offer, you know, times to clients.

240

00:35:10.940 --> 00:35:29.010

Brian Voss: and my staff said, it is so hard to coordinate your schedule, and we do it that way. We're giving open ended questions to clients. It's impossible. Your life would make it easier for us if you would just pick a time slot. And I said, All right, you know what I'm gonna go even further. You pick the time slots. What makes sense for you guys in the office? And they said, 930-11-1230 and 4.

241

00:35:29.250 --> 00:35:49.139

Brian Voss: Everything in the world got easier once we did that, no clients balked at having those time slots available. But it wasn't in surge 1.0 or surge 2.0. It was like surge 4.0 before we made that change, and so take the pressure off. I just heard Carl, Richards and kitsis do the podcast where Richards talked about doing version 0 to take the pressure off

242

00:35:49.140 --> 00:36:03.479

Brian Voss: right? So like, he would just say, I'm gonna do this thing. But it's version 0, not a draft. It's made for public consumption. But we know in advance, we're gonna change it. We're gonna call it version 0. Everything we did in my office was version 0. We're gonna do search.

243

00:36:03.690 --> 00:36:14.090

Brian Voss: And then we're gonna adjust. And then we're gonna do it again with those adjustments over and over again, and that just took all the prep. There was no desire to be perfect. Just survive and make it better the next time.

244

00:36:14.720 --> 00:36:40.640

Stephanie Bogan: Well, the thing I like about that so much is notice that the expectation is radically different from. I gotta get this right before I launch, which is a strategy our brains use to keep us from launching. Truly, but when you start at 0, I heard someone. If you write or do content. I, when I had to sit down and like it's, you know, takes an hour to get the 1st paragraph out, and then it gets going. And so right it's hard to sometimes.

245

00:36:40.942 --> 00:36:59.639

Stephanie Bogan: So I heard I read something I thought was really powerful, and someone said, I write every day. I just write for the trash can right? Like just no judgment or expectation. I'm just in the habit of writing so it's really about like, are you putting yourself in the position to make the changes that are ultimately going to move the needle?

246

00:36:59.660 --> 00:37:03.929

Stephanie Bogan: Alright. So I want everyone to take a moment of reflection.

247

00:37:04.080 --> 00:37:14.190

Stephanie Bogan: and think about your growth kind of where you are in your growth journey, what you've been doing, what your goals are, what Adam story, Brian's story

248



00:37:16.140 --> 00:37:24.209

Stephanie Bogan: is there a thing? Is there a place where you can really look at optimizing, simplifying, decluttering

249

00:37:24.784 --> 00:37:32.639

Stephanie Bogan: something that you're doing outside of right? Go start new podcast go, do this new shiny thing right? Is there a place where you can

250

00:37:32.710 --> 00:37:34.600

Stephanie Bogan: get better at the basics?

251

00:37:35.270 --> 00:37:39.950

Stephanie Bogan: Take a moment to think about that, and drop your thoughts in the chat, and then I'm gonna have a couple of you share.

252

00:37:40.640 --> 00:37:48.320

Brian Voss: And while you're thinking about that, I will challenge you because I didn't believe this in the beginning, I will challenge all of you. Everything can be simplified.

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00:37:48.500 --> 00:37:54.320

Brian Voss: everything. You might think you can't do it because your clients want more or want it to be more thorough.

254

00:37:54.650 --> 00:38:04.299

Brian Voss: I promise you it would. It's embarrassing when I share with people the stuff we give our clients that they absolutely love and rave about. It is so simple you can simplify everything.

255

00:38:05.477 --> 00:38:18.680

Stephanie Bogan: This is a great question, Adam, for you, and then Brian for you so I keep talking about being brilliant at the basics. And roshani asked a really intelligent question, which is, What are the basics? Can you list them?

256

00:38:19.232 --> 00:38:29.219

Stephanie Bogan: Right. I take them all for granted. Right client models and service and niches and all that. But, Adam, do you want to give your rundown like? What was that like? Check the boxes of things that you did. And then, Brian.

257

00:38:29.400 --> 00:38:40.609

Stephanie Bogan: what were the again? There's lots of things you can do here, but there's usually right 3 to 5 in the 1st year or 2 that really moves the needle. Adam, do you wanna share what you what you think yours were.

258

00:38:41.410 --> 00:38:53.200

Adam Cmejla, CFP®: 1st thing is, what are you solving for? And that comes back to the the irony that was having this conversation with another advisor, and we were just kind of joking. I wonder how many



advisors fit the

259

00:38:53.300 --> 00:38:53.940

Adam Cmejla, CFP®: the

260

00:38:54.800 --> 00:38:56.470

Adam Cmejla, CFP®: not parable, but the

261

00:38:57.050 --> 00:39:03.799

Adam Cmejla, CFP®: cliché, if you will, of cobbler's kids, have no shoes. How many of you on this call have done your own financial plan

262

00:39:03.910 --> 00:39:07.160

Adam Cmejla, CFP®: to know how much money you want to make.

263

00:39:07.220 --> 00:39:12.810

Adam Cmejla, CFP®: and there's an infinite amount of money that you can make if you deliver like. If you want to make more money, just deliver more value.

264

00:39:13.020 --> 00:39:21.799

Adam Cmejla, CFP®: Value precedes that value, precedes income. Right? Read Alex or Mosey's book. 100 million dollar offers right? If you

265

00:39:22.060 --> 00:39:36.539

Adam Cmejla, CFP®: you build it, they will come, deliver value, deliver significant value, massive. Whatever adjective you want to use, and there's an infinite amount of money that you can make, whatever that is. Start on the personal side. How much do you want to make personally.

266

00:39:37.010 --> 00:39:40.159

Adam Cmejla, CFP®: after taxes, including savings, goals, including everything.

267

00:39:40.280 --> 00:39:48.579

Adam Cmejla, CFP®: Then from there work the business model. I know we talk in limitless a lot about figuring out. Okay, what's the my model practice? How much money does my business need to make?

268

00:39:48.590 --> 00:39:50.649

Adam Cmejla, CFP®: etc, etc? Well, the

269

00:39:50.920 --> 00:40:06.439

Adam Cmejla, CFP®: that only matters. If you know what you are solving for personally. And so I wonder how many of us on this call have truly drank our own Kool-aid, and are not only investing like our clients. But we've also done our own financial plan. Assuming that you have the answer to that.

270



00:40:06.570 --> 00:40:13.520

Adam Cmejla, CFP®: then it comes down to the my model practice, which then influences how much service you're going to be delivering to your clients.

271

00:40:13.710 --> 00:40:24.330

Adam Cmejla, CFP®: which then influences, and who that client is which then influences the fee, model, or modality of fee. Right? I've said this long or many, many times that

272

00:40:25.090 --> 00:40:29.460

Adam Cmejla, CFP®: I would have been bankrupt if I tried to serve Ods on an aum fee structure

273

00:40:29.710 --> 00:40:32.250

Adam Cmejla, CFP®: like that just would not have worked.

274

00:40:32.280 --> 00:40:42.009

Adam Cmejla, CFP®: So you have to figure out the fee modality that's going to work and make sure that it is profitable for your type of client model which then breeds the service model.

275

00:40:42.460 --> 00:40:47.999

Adam Cmejla, CFP®: Limitless could literally be those 4 things right? Your own financial plan.

276

00:40:48.340 --> 00:40:52.569

Adam Cmejla, CFP®: client service, model, ideal client, avatar, fee structure.

277

00:40:52.590 --> 00:40:58.760

Adam Cmejla, CFP®: if limitless. Only did those 4 things. And everybody here quote unquote, just focused on those 4 things.

278

00:40:58.840 --> 00:41:02.860

Adam Cmejla, CFP®: Every single one of you would be absolute freaking rock star advisors.

279

00:41:02.890 --> 00:41:15.150

Adam Cmejla, CFP®: We do all the other things because it adds value. And it's the it's the spokes that come off of an advisory practice. But the hub of this Roshani to your point is, if you do those 4 things, and and

280

00:41:15.390 --> 00:41:19.939

Adam Cmejla, CFP®: preceding those 4 things, you know what you're solving. For on the personal side.

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00:41:19.940 --> 00:41:20.450

Stephanie Bogan: Yeah.

282

00:41:20.450 --> 00:41:21.150

Adam Cmejla, CFP®: That's it.

283

00:41:21.640 --> 00:41:25.621

Stephanie Bogan: Well, it's funny you heard me talk about. I was just putting this in the chat.

284

00:41:27.150 --> 00:41:46.309

Stephanie Bogan: I'll have to wait a minute. You guys have heard me talk about the broomstick. Right? So if you think about right, the the business model super simply defined. And it, Adam, you just put it like almost in those exact terms as we always talk about like vision and mindset. Right? You gotta be really clear in the what and the why. So you don't make a bunch of dumb mistakes and make bad decisions

285

00:41:46.770 --> 00:41:53.020

Stephanie Bogan: right? And then, so we've got mindset vision. We've got time, which is right. What we do and who we do it with.

286

00:41:53.070 --> 00:42:00.209

Stephanie Bogan: And then ultimately, the next thing is our client model pricing and profitability essentially like, who are they? What do we get.

287

00:42:00.380 --> 00:42:08.479

Stephanie Bogan: but what do we give them, and what do we charge for it? And then it branches off. This is a really bad visual. It branches off like, think of like a broomstick.

288

00:42:09.108 --> 00:42:12.000

Stephanie Bogan: To staffing operations and growth.

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00:42:12.260 --> 00:42:30.529

Stephanie Bogan: Which is why, even in leaders, right or in our 1 billion dollar firms, we are always looking at those 4 things, and in particular, that client model right price. Who is it? Pricing and fee service model which are 3 of the 4 things that Adam mentioned. Right? Everything else is what you wanna build and how you're gonna use your time.

290

00:42:30.530 --> 00:42:43.899

Stephanie Bogan: The client model is the guts of the blueprint. If that doesn't work as you've all heard, it all breaks down, because then we have issues with our staffing, our operations and our growth. And then that's complex and inefficient and right. And then we compound all those problems.

291

00:42:44.010 --> 00:42:53.409

Stephanie Bogan: If you get really clear on that client model, if you have not done that, that is the biggest growth lever that you have. Because one you're going to optimize the practice that you have.

292

00:42:53.450 --> 00:43:04.730

Stephanie Bogan: You're gonna optimize the time that you have by getting clear on who you serve putting those service models in place, Brian, you should talk about yours because they're not like big

Crm Whoopee systems like

293

00:43:04.780 --> 00:43:06.890

Stephanie Bogan: basic really works.

294

00:43:06.930 --> 00:43:18.519

Stephanie Bogan: And then, right then, you're in a place to really like, think about how you might want to grow from there, but is right. Brian is shared. In many cases you guys are gonna find that a lot of that growth really does take care of itself.

295

00:43:19.248 --> 00:43:21.160

Stephanie Bogan: So vision and planning

296

00:43:21.390 --> 00:43:28.419

Stephanie Bogan: right? Think my model practice answer like literally, that's enough of a vision. You do not need to do deep business planning.

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00:43:28.610 --> 00:43:30.689

Stephanie Bogan: pricing, and profitability.

298

00:43:30.860 --> 00:43:39.810

Stephanie Bogan: Right? That's who is the client right? Who is the ideal client pricing and profitability and service model those things together? Are that client model

299

00:43:40.213 --> 00:43:50.120

Stephanie Bogan: and then you, when you've got that nailed that helps you define what's the right staffing model? Right for the clients and the services you're providing in the income and the freedom that you want.

300

00:43:50.710 --> 00:44:00.960

Stephanie Bogan: Right. What are the operations, Brian? You should. And Adam can both talk about that right? Brian is got has kept it really, really simple. But again, he's not over complicating it.

301

00:44:01.030 --> 00:44:22.839

Stephanie Bogan: something to really think about. And then growth, share of wallet referrals, client referrals is going to get most of you most, if not all the way to your growth goals unless you genuinely do want to really hit a a high growth rate or keep growing past that right 1 million dollar 100 million mark but you're then in a good position, like Brian and Adam

302

00:44:22.840 --> 00:44:42.939

Stephanie Bogan: to make choices about how you do that. What clients you do it with, you know. Do you average up again and sell off clients? Do you bring in service advice like you're in, an you're in an empowered position because you've got a great practice. You've got margin. And right, you have the ability. Now, I was just talking with Adam.



303

00:44:43.170 --> 00:45:05.939

Stephanie Bogan: Adam does not sit around going. I don't know I'm gonna do that. I don't know. Ideas gonna work. I don't know. I mean, he might have like questions like, I don't know. Or what do you guys think he'll call me or Michael or his study group like he's a wildly more empowered founder and business owner than he was 5 or 6 years ago. He's like, Oh, this seems like a good goal. What's it gonna take?

304

00:45:06.380 --> 00:45:18.069

Stephanie Bogan: Which is very different than sitting back and going? Oh, I hope I can make it happen. So just something to think about as you guys think about those structures where in that client model.

305

00:45:18.110 --> 00:45:21.890

Stephanie Bogan: if you haven't checked all those boxes what's really stuck in you.

306

00:45:24.160 --> 00:45:30.330

Brian Voss: Yeah. So if we're talking back back to the basics part one of the things I will say. And I know this is cliché. And it's said all the time

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00:45:30.781 --> 00:45:37.830

Brian Voss: picking a niche made all the difference for us. So I work exclusively with people that are within 5 years of retirement, or already retired.

308

00:45:38.000 --> 00:45:58.250

Brian Voss: Once I chose that niche, then I could identify what are the most common questions that this group of clients always has. Right? So again when it's to the back to the basics, and I was trying to write notes as we went here. But you know all of my clients want to know? What do I have? How does my money work together? How much can I afford to spend in retirement? How should I invest my money? How do I minimize taxes over my lifetime?

309

00:45:58.400 --> 00:46:09.660

Brian Voss: Once we know the recurring questions or pain points or value adds that the clients had, then we could create repeatable systematized processes to address every single one of those consistently

310

00:46:10.080 --> 00:46:16.980

Brian Voss: when we were really trying to get things going, and we were struggling in the beginning, one of the mantras that I had with the group was, build it once.

311

00:46:17.060 --> 00:46:26.900

Brian Voss: and what I meant by that was, if we find something that's a recurring task, if we have to do it more than once a year, and in particular, if we have to do it more than once a month.

312

00:46:27.280 --> 00:46:42.780

Brian Voss: take the time to write standard operating procedures. And it's simple. We have a shared word document where anytime there's something we do all the time. We just write the steps in that document. And if it's really complicated, we use vidyard. You can use loom. You can use bombbomb. I don't care who you use.



313

00:46:42.920 --> 00:46:45.930

Brian Voss: We would record a video of the steps to get it done.

314

00:46:46.470 --> 00:46:52.300

Brian Voss: So I mean when it comes to basics for us, and we would do that for everything. We would sit down and say, You know we got to do surge?

315

00:46:52.330 --> 00:47:05.379

Brian Voss: And again back to the questions, what's the hardest part of surge? So to to walk you through the journey. The 1st time we went to do surge, one of the people in my office had to make a hundred 75 outbound phone calls to clients.

316

00:47:05.560 --> 00:47:17.820

Brian Voss: We said, This is stupid. It's time consuming. We spend all of our time returning phone calls. What if we use? We had to use schedule once due to compliance purposes calendly fill in the blank. What if we send an email out?

317

00:47:17.880 --> 00:47:40.079

Brian Voss: And what if we got lucky? What if a 3rd of the people scheduled the meeting themselves. A 3rd of the people called the office to schedule the meeting. It only leave a 3rd of the people that we needed to follow up with. We didn't know how it was going to work. It was just literally, here's a pain point we know we have to schedule these meetings. It's something that's a recurring process. We have to do all the time. What's something we can do to improve it. Let's send an email invitation the very 1st time we did it.

318

00:47:40.080 --> 00:48:00.310

Brian Voss: The the biggest mistake my staff made is, I think they sent like a hundred emails on the 1st day in the 1st hour, and all of a sudden, every single like they were just scheduling my staff freaked out. They're like your schedule is filling up like all of these appointments are just getting taken. They didn't understand like they were expecting that they're gonna have to make 170 outbound phone calls instead of 175.

319

00:48:00.390 --> 00:48:06.819

Brian Voss: It happened to work out almost exactly as we. We just threw the idea out. About the 3rd of the people immediately

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00:48:06.830 --> 00:48:12.040

Brian Voss: schedule something about a 3rd of the people called the office to schedule something because they just weren't comfortable.

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00:48:12.150 --> 00:48:23.860

Brian Voss: We only had to make about a 3rd of the phone calls, and as people got more and more familiar with the process, the number dropped and dropped. So in in terms of what are the basics for us. It was we got to meet with our clients. We want to meet with them a minimum of twice per year.



322

00:48:23.930 --> 00:48:32.809

Brian Voss: What's every step in that process. That is a basic, repeatable step. How do we create the agenda every time? How do we share information with them? We didn't get it right the 1st time.

323

00:48:33.030 --> 00:48:37.910

Brian Voss: at the end of every surge we would say, this thing was hard. How do we make it easier?

324

00:48:37.920 --> 00:48:41.610

Brian Voss: And that was always my 1st question what felt harder than it needed to be.

325

00:48:41.790 --> 00:48:43.149

Brian Voss: How do we make it easier.

326

00:48:44.200 --> 00:48:45.229

Brian Voss: you know, for those of you.

327

00:48:45.230 --> 00:48:58.880

Stephanie Bogan: It's a great example of that right when I always say, Ask better questions and you get better answers. We we get like the symptoms, and we're frustrated and right. But stopping to take that moment, particularly when you have right team to help you and say, Hey.

328

00:48:59.000 --> 00:49:15.829

Stephanie Bogan: what was hard, what didn't work. What's it gonna take to fix it? You'll find they tend to get really engaged and invested in helping you find the solutions when you come to them with empowered questions like, Oh, why did this happen? Frustrated, frustrated is not gonna get you an empowered team ready to respond

329

00:49:15.860 --> 00:49:28.519

Stephanie Bogan: and solve the problem like, hey? That sucked. Can we agree? We don't want to do that again? Yes, alright. Let's like what made that hard. Let's have that conversation. Let's figure out how to fix it. Do you guys feel like you have what you need to make it better? Yes, time

330

00:49:28.660 --> 00:49:31.359

Stephanie Bogan: better next time. Yes, go. Great.

331

00:49:31.360 --> 00:49:39.930

Brian Voss: Stressed with my staff always that if something goes wrong in our office it's the process that was broken. Not a person that made a mistake.

332

00:49:40.230 --> 00:49:53.539

Brian Voss: So nobody has to avoid bringing an issue to the table because we're not trying to place blame. Where was the process? Broken distribution goes wrong. Money doesn't get invested. There's a problem in the process. Let's sit down together and fix the process.



333

00:49:55.370 --> 00:50:03.740

Stephanie Bogan: Yeah, there is always a solution, right? The question is, how much time and energy you need to spend to finding one. Sometimes you're like, hey, that's just the thing that happened. Right

334

00:50:04.440 --> 00:50:13.339

Stephanie Bogan: custodian changed the paperwork. We fixed it blip sometimes it's right symptomatic of something deeper and right in the practice that you have, that you need to update and change.

335

00:50:13.757 --> 00:50:35.690

Stephanie Bogan: It could be right going back to, you know. Do you have a consistent client profile, even if you can't get narrower right than within 5 years of retirement or retired, you can get really good at defining your ideal client avatar defining your messaging so that it appeals to write a certain type and style of retiree that really syncs with you. Right? That

336

00:50:35.690 --> 00:50:46.500

Stephanie Bogan: that's going to be that kind of story and brand voice really coming out, there are people that will see brands website and be like, Yeah, not for me. And there'll be people to see and go. Oh, my gosh! That's exactly the kind of person I want to work with.

337

00:50:46.906 --> 00:51:09.373

Stephanie Bogan: So it's really about picking your differentiated position. And then again, just going through the components? Do I have that in my story? Is it on my website? Have I communicated it to clients? So you'll notice, as Brian and Adam point out there's a framework to everything. If you follow that framework, you'll that's where you start right. The fly will. And that momentum just continue to build and build.

338

00:51:10.650 --> 00:51:20.760

Stephanie Bogan: I know you guys are answering questions in the chat. If you guys wanna unmute or ask questions, feel free. We've got Adam and Brian. I'm sure they'd be happy to answer them. Live. I always feel like I need to encourage you guys to do that. I forget

339

00:51:24.330 --> 00:51:31.869

Stephanie Bogan: alright any questions around. Just sort of those basics. That was a great question. I think that was that you, Barbara? That was a great question.

340

00:51:33.190 --> 00:51:46.560

Stephanie Bogan: How many of you honest engines, and I can see most of you. How many of you have checked all those boxes in the right, the client model flywheel who the client is pricing and profitability service model.

341

00:51:46.780 --> 00:51:48.710

Stephanie Bogan: Where are you when it comes to that?

342

00:51:51.140 --> 00:51:53.540

Stephanie Bogan: That a growth optimizer for you, Edwin.



343

00:51:55.500 --> 00:51:57.500

Edwin K. Retter, CFP®, CMT: You mean? Have I done all that officially?

344

00:51:59.010 --> 00:52:03.019

Edwin K. Retter, CFP®, CMT: I guess it's a work in progress. So no, not not officially.

345

00:52:03.390 --> 00:52:16.379

Stephanie Bogan: Yeah, the thing that I think is important to note there. Adam talks about it a lot. Brian really said it again, which is right, I picked something. And I said, this is the thing we're gonna implement, because this is the thing that's gonna get us to the next thing, whatever that thing is

346

00:52:16.800 --> 00:52:25.469

Stephanie Bogan: right. So, Edwin, if you had to pick the one thing that right right was gonna be the thing that got that flywheel really moving, what would your one thing be.

347

00:52:26.730 --> 00:52:34.529

Edwin K. Retter, CFP®, CMT: Probably marketing in some form, but it's a little bit of the overwhelm, and then inability to, I guess.

348

00:52:34.640 --> 00:52:41.189

Edwin K. Retter, CFP®, CMT: pick something and run with it, or to your point of thinking, it has to be perfect before actually running with it

349

00:52:41.622 --> 00:52:48.187

Edwin K. Retter, CFP®, CMT: and then juggling everything with surges, and like day to day, and hurricanes bearing down on the State today.

350

00:52:48.500 --> 00:53:02.219

Stephanie Bogan: Yes. Well, best wishes. Yeah. Best wishes, all of you, and that I hope everyone's okay. Can I ask a couple of clarifying questions. Are you clear on the client? You want to grow like who you're really focused on for your growth.

351

00:53:02.490 --> 00:53:08.581

Edwin K. Retter, CFP®, CMT: Yeah. Pro retirees or pre retirees. Age 55 and up, who've already accumulated a million in assets.

352

00:53:08.920 --> 00:53:18.689

Stephanie Bogan: And have you sort of done that like brand storytelling, differentiated messaging work to make sure you've really got that that ideal client profile and kind of messaging honed for them.

353

00:53:19.350 --> 00:53:21.450

Edwin K. Retter, CFP®, CMT: What was the 1st part? Have I.



354

00:53:21.450 --> 00:53:29.620

Stephanie Bogan: Done the brand kind of the branding messaging story piece to really hone the messaging around that target so that you can put that through all of your marketing.

355

00:53:29.970 --> 00:53:31.790

Edwin K. Retter, CFP®, CMT: No, I don't. I wouldn't say that.

356

00:53:31.790 --> 00:53:33.330

Stephanie Bogan: Okay. So literally.

357

00:53:33.570 --> 00:53:37.859

Stephanie Bogan: like, I'm just gonna build, we? Well, we have the path. That's why there is that path right?

358

00:53:37.910 --> 00:53:56.030

Stephanie Bogan: That is the next step, so you can go do a bunch of marketing. But it's gonna be half as efficient as if you have a clear, concise, and compelling story that you can that allows you to confidently communicate your value, whether it's in an elevator or a website, or a Coi meeting, or in a client conversation.

359

00:53:56.200 --> 00:54:22.059

Stephanie Bogan: right, you know, or right in an email or a podcast, like having that brand platform, if you will, is one of those things where we're like, oh, it's for big firms, and yes, you can get by with. Hey? I do this right, and we're talking about right. We're not getting by here. We're getting brilliant at the basics. Because that's right, not skipping those steps. To go off and grow is what's gonna really optimize our growth engine.

360

00:54:22.130 --> 00:54:33.099

Stephanie Bogan: So ideal client profile. Your ideal retiree is gonna be a little bit different than Brian's. If you look at Liz hands website at pleasant wealth, right? It's independent women.

361

00:54:33.330 --> 00:54:52.950

Stephanie Bogan: wildly different you wanna make sure that you have that client profile and a clear, compelling story that shows up when you've got that story done. If your website is not updated to reflect that in a high quality way and be a conversion engine. That's external marketing job one.

362

00:54:52.950 --> 00:54:54.450

Edwin K. Retter, CFP®, CMT: That is in process. So.

363

00:54:54.450 --> 00:55:02.959

Stephanie Bogan: Yeah, share wallet client referrals and coi referrals is the internal right update. Right? Go tell people the new and improved story, and that tends to generate business.

364

00:55:03.421 --> 00:55:11.000



Stephanie Bogan: So for those of you who are in a similar spot before you go worry about, hey? Which channels and all that which you're gonna get to really quick.

365

00:55:11.180 --> 00:55:26.029

Stephanie Bogan: The idea is, who's the client? How my messaging to them? If you have not done that on purpose, I promise you there are opportunities to optimize that, so that the marketing you do is more effective, more concentrated.

366

00:55:26.730 --> 00:55:32.880

Stephanie Bogan: Then that goes to your website. Right? Think 1st phase of external marketing, because everything goes through there.

367

00:55:32.950 --> 00:55:38.149

Stephanie Bogan: Internal marketing clients, centers of influence. Right? How are you going to reframe and recast that

368

00:55:38.180 --> 00:55:43.500

Stephanie Bogan: that conversation with people which is a great growth opportunity. Look how that happened.

369

00:55:43.590 --> 00:55:48.149

Stephanie Bogan: right? So that alone could keep you busy for the next 6 months, Edwin.

370

00:55:48.170 --> 00:55:56.840

Stephanie Bogan: and it will right generate business. You're updating your website like going through all of those things and really tightening as we talk about like tightening the gears. Now.

371

00:55:56.870 --> 00:56:03.249

Stephanie Bogan: we've laid the tracks that's gonna get you a lot farther than going out and doing 5 more things.

372

00:56:03.829 --> 00:56:16.410

Stephanie Bogan: Tighten up the story, update the website, tell that story to your clients and centers of influence better and in a more structured and consistent way. Which is your referral system. And you're cultivating Coi campaigns

373

00:56:17.620 --> 00:56:27.319

Stephanie Bogan: that will keep you busy for a while. If you run out of stuff to do or growth, you let me know, and we'll come up with it. But that's like the next 6 months of your life right there.

374

00:56:27.320 --> 00:56:29.270

Edwin K. Retter, CFP®, CMT: Yeah. Yeah. Thanks. Steph.

375

00:56:29.880 --> 00:56:31.580

Stephanie Bogan: Does that help a little bit.

376

00:56:31.810 --> 00:56:32.440

Edwin K. Retter, CFP®, CMT: Yeah. Thanks.

377

00:56:32.440 --> 00:56:39.119

Stephanie Bogan: Notice. I mean, I know. Obviously, it's helpful when we're here, and we have these conversations with you, which is why we're here. And we have these conversations with you.

378

00:56:39.450 --> 00:56:44.450

Stephanie Bogan: But I also want you guys to remember that. Right, Kenneth. You can do that in your own office, hey?

379

00:56:44.900 --> 00:56:52.610

Stephanie Bogan: What's the one thing they keep saying it. What is by one thing, if you're not clear on what it is right now, we need to pick a 1 thing.

380

00:56:52.760 --> 00:56:57.089

Stephanie Bogan: And again, for growth, it might be, Hey, it's time to start the podcast.

381

00:56:57.260 --> 00:57:14.349

Stephanie Bogan: but make sure that right? You've got everything squared up and tight and solid, so that you're taking the the optimal package to the marketplace so that everything you do has a higher concentration result.

382

00:57:14.350 --> 00:57:30.260

Stephanie Bogan: so that you can do a lot less with far greater efficacy, the intangible here of putting that messaging together and then making it tangible in your sales process in your website has very real value, and you will absolutely see it.

383

00:57:30.260 --> 00:57:37.579

Brian Voss: And I wanna I'm stealing a quote here from Bill Gates. It's it's tangential to this. But it's why I wanted to focus on the basics so much.

384

00:57:38.032 --> 00:57:44.530

Brian Voss: Bill Gates is famous for saying, the 1st rule of any technology used in a business is that automation

385

00:57:44.550 --> 00:57:49.279

Brian Voss: applied to an efficient operation will magnify the efficiency.

386

00:57:49.480 --> 00:57:56.460

Brian Voss: The second rule is that automation applied to an inefficient operation will magnify the inefficiency.



387

00:57:56.510 --> 00:58:15.209

Brian Voss: One of the reasons we got so boring and so basic in our office was that I didn't want to magnify any inefficiencies. I didn't want 10 clients all wanting to get on boarded at the same time, and our inefficient processes were then magnified, and we were unable to properly onboard them or get the work done.

388

00:58:15.330 --> 00:58:43.369

Brian Voss: I wanted to be so efficient with the existing clients that when we needed to do something with a new client, when we wanted to turn on the growth engine, we had the capacity for it. So again, back at Tim. Tim Ferris is the one, I believe, who deserves credit for the quote. You really gotta look at that lead domino for you like. What is the one thing you can do? What can you knock down? That'll help you with 3 or 4 other steps again for us it was surge that created the time and space to then go do everything else we wanted to do. But you know, automation

389

00:58:43.490 --> 00:58:52.990

Brian Voss: will magnify inefficiency and efficiency. Be really careful about wanting to turn on that growth engine. If you don't have the boring fundamental building blocks.

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00:58:52.990 --> 00:58:53.440

Stephanie Bogan: Yeah.

391

00:58:53.440 --> 00:59:10.109

Brian Voss: Business running smoothly because you will turn it on, and you will regret it. And oh, by the way, it's the opposite of a lead domino. Now, if that growth engine is working and you don't have the efficient building blocks working, it's even harder to find the time to go back to work on the basics to fix that efficiency.

392

00:59:10.400 --> 00:59:11.050

Brian Voss: Yeah.

393

00:59:11.470 --> 00:59:20.900

Stephanie Bogan: Yeah. And and no one likes to call their cois and be like, actually, please stop sending clients. I'm so inefficient I can't handle it right now. That doesn't happen right? We suck it up. And we.

394

00:59:21.110 --> 00:59:32.279

Stephanie Bogan: you know, we work at 4 am. And so you've heard me say many, many times this year. You're gonna hear me say it because I really wanna write it to be part of our consciousness is that much of our hard work

395

00:59:32.640 --> 00:59:43.339

Stephanie Bogan: is the result of our unwillingness to make the hard decisions to stop and say, You know, why am I not making the progress that I wanted to this year? Right? And did I pick a 1 thing, and did I implement it?

396



00:59:43.350 --> 01:00:08.319

Stephanie Bogan: If not, what? What of the basket of excuses have I used? And right. What commitment am I going to make to overcome that basket? Hey? Do I have a marketing plan that has 19 things in it might want to rethink that like, hey, I should go back to that outline instead of went through. And right do I have my core marketing platform ready to take to the marketplace right if I wanted to invite you to a really cool party. Mark

397

01:00:08.460 --> 01:00:20.380

Stephanie Bogan: and I like scribbled out an invitation on a post. It and I put it in my pocket, and then it rained, and then I handed it to you, all sticky with candy for my kid, and I was like, Hey, will you come to my party? Would you want to come?

398

01:00:22.550 --> 01:00:23.940

Stephanie Bogan: No

399

01:00:24.170 --> 01:00:35.459

Stephanie Bogan: right like how we present the message, the clarity, the confidence, right? How we like that stuff really does matter because you have to stand out in an increasingly crowded marketplace.

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01:00:36.770 --> 01:00:53.580

Stephanie Bogan: and you know, referrals are down across the the profession. We've seen a huge decline, and my theory is is because other people are finding them before they need to ask their friends and accountants about you. Right? I listen to a blog or someone. I'm on someone's email, or there's content on the Internet, or a Google ad is popping up.

401

01:00:53.590 --> 01:01:01.710

Stephanie Bogan: And so I've got someone probably focused on me right? But certainly a bunch of someone's focused on planning or retirement

402

01:01:01.870 --> 01:01:11.030

Stephanie Bogan: who have access to me such that I might never need to call you, Mark, or ask my accountant about you, because people are inserting themselves into my space.

403

01:01:11.080 --> 01:01:12.770

Stephanie Bogan: And you're not.

404

01:01:12.900 --> 01:01:18.509

Stephanie Bogan: And that's the thing to think about, right with clients and centers of influence. We are very passive.

405

01:01:19.180 --> 01:01:30.660

Stephanie Bogan: but it's the 70 or 80% of most firms growth. And if we do it on purpose, right? Look at what's happened with Brian and Jed. And like, when we do things on purpose, we tend to really optimize our results.

406



01:01:32.250 --> 01:01:59.030

Stephanie Bogan: So just something to think about as you guys kind of think through right? There is a roadmap as I've shared with you. We're gonna talk about it here in just a second like, what's that framework? Right? It's in the program guidebook. If you think about the path right? Pick a client, tell the story update the website right. Do your client referrals? Do your centers of influence. If you're doing those things, then if you need external marketing, then think about those things, choose your channel marketing plans, etc.

407

01:01:59.290 --> 01:02:08.410

Stephanie Bogan: right? If you literally follow that path, the steps might be a little bit different for each of you, but you certainly have the discernment to figure that out or to call us and ask.

408

01:02:08.470 --> 01:02:16.019

Stephanie Bogan: it really does give you that step by step, roadmap. The issue most of the time is we're so busy trying to get ahead

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01:02:16.270 --> 01:02:22.040

Stephanie Bogan: that we really run out of time to keep up. And that's why I think Brian's conversation is so powerful

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01:02:22.120 --> 01:02:31.730

Stephanie Bogan: because it wasn't a conversation about all the gross stuff he did and all the new things he added, and all the money he spent and all the phone calls he make.

411

01:02:32.010 --> 01:02:34.040

Stephanie Bogan: It was a conversation about

412

01:02:34.220 --> 01:02:46.720

Stephanie Bogan: all the focus of what's gonna really move the needle to get that practice. I said that I really wanted right. We're entering that. No excuse zone. And then it was, what thing is, gonna get that flywheel going for me

413

01:02:46.840 --> 01:02:53.379

Stephanie Bogan: right? It's checking that mindset and saying, hey? Right, if I do this, and then this, and then this.

414

01:02:53.500 --> 01:03:01.679

Stephanie Bogan: I know, the formula will work, and I know it can be hard to Brian's point when you're sitting in your office on the other side of the zoom, hearing those stories.

415

01:03:02.231 --> 01:03:13.680

Stephanie Bogan: Which is why I want to have more conversations like this about right? How right? How our advisors, how are you guys applying the lessons and ways that really work? Because that's the secret sauce right there.

416



01:03:14.130 --> 01:03:15.919
Stephanie Bogan: Brian, anything you want to add

417

01:03:16.252 --> 01:03:22.530
Stephanie Bogan: just in terms of right keeping it keeping it simple, I think, which is the the Brian's gonna be the simple guy, Adam.

418

01:03:22.530 --> 01:03:23.080
Brian Voss: Okay, with that.

419

01:03:23.080 --> 01:03:23.660
Stephanie Bogan: Bye.

420

01:03:24.270 --> 01:03:25.469
Brian Voss: I got no problem with this.

421

01:03:25.470 --> 01:03:26.710
Stephanie Bogan: The Circle Guy.

422

01:03:26.710 --> 01:03:31.674
Brian Voss: I spent too much of my career complicating things. One of the hardest things I did was try to make it simple.

423

01:03:31.950 --> 01:03:42.839
Brian Voss: I think. Another thing I would say is, when you, when you focus on the building blocks and you get the basics done right, and you're delivering consistently on those from a growth perspective, you make yourself more referable.

424

01:03:42.940 --> 01:03:54.050
Brian Voss: and I think that gets lost. I think it's easy to want to go and to God bless you, Adam, it's easy to want to go and do the podcasts or work with the cois or create the marketing pieces.

425

01:03:54.110 --> 01:03:59.109
Brian Voss: because it feels like you can turn that around to new business relatively quickly.

426

01:03:59.230 --> 01:04:06.579
Brian Voss: It's harder to sit there and say, I'm going to consistently deliver quality service for 2 or 3 years straight

427

01:04:06.610 --> 01:04:23.889
Brian Voss: to my clients. And then it's gonna be so good to to quote Seth Garden that Goden, it's remarkable. It's worth remarking on where someone wants to actually say, you really need to go talk to Brian, because we've had such a good experience. They're consistently good, not occasionally great. They do all of these things like



428

01:04:24.160 --> 01:04:39.409

Brian Voss: it's I get it like I would love to go out and do marketing, and just look at and say, Oh, I pulled this lever, and I got 15 new accounts like, that's way. More fun than sitting down and saying, I pulled this lever, and 4 years later I got a 5 million dollar referral from a coi.

429

01:04:40.420 --> 01:04:46.899

Stephanie Bogan: There's there's like 0 dopamine. And I laid out a checklist today.

430

01:04:47.440 --> 01:04:48.640

Brian Voss: People, for.

431

01:04:48.640 --> 01:04:57.830

Stephanie Bogan: No, I I am a closet geek! I do get a sick sense of satisfaction out of my spreadsheets and my checklist. My team will tell you I am freakish about them.

432

01:04:58.330 --> 01:04:59.149

Stephanie Bogan: I should.

433

01:04:59.150 --> 01:05:14.260

Brian Voss: Thing was just being referral, like again. Then, when you do the marketing campaign, it's so much easier, like we got unsolicited referrals from Cpas and I finally asked them why. And they said, because every time we call your office everything happens the way it's supposed to

434

01:05:14.550 --> 01:05:25.229

Brian Voss: the meetings get set when they're supposed to. The documents show up when they're supposed to. We weren't doing anything special. They didn't say, Oh, you've got this amazing tech, you know, planning technique that nobody else talks about.

435

01:05:25.500 --> 01:05:31.859

Brian Voss: We did frankly, more simplified things than everyone else, but everything worked every time.

436

01:05:32.720 --> 01:05:40.859

Stephanie Bogan: Remember, that's that trust equity we talk about where you build it with clients when you build it with centers of influence, when you build it with an audience.

437

01:05:41.030 --> 01:05:47.309

Stephanie Bogan: Right? You get a lot of permission to create value for them and growth opportunity for you. So

438

01:05:47.580 --> 01:05:56.179

Stephanie Bogan: do you guys have any questions for Brian or Adam around where you are in your growth journey or any specific I know there's a lot of stuff going on the chat. I just, I'm gonna tell you about



439

01:05:56.250 --> 01:06:01.389

Stephanie Bogan: 2025 and answer any questions you have about that. But I wanna make sure if you have any

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01:06:01.800 --> 01:06:03.940

Stephanie Bogan: final questions that we get those answered for you.

441

01:06:05.380 --> 01:06:06.870

Stephanie Bogan: Was this helpful today?

442

01:06:08.660 --> 01:06:20.709

Stephanie Bogan: Alright, does everybody have a 1 thing? So that is, we're gonna wrap this portion of today's program by asking you to drop your next one thing in the chat while you're doing that.

443

01:06:20.770 --> 01:06:27.389

Stephanie Bogan: Clark, Jeremy Taylor and Nicole, I'm gonna ask you what your next one thing is.

444

01:06:27.610 --> 01:06:29.230

Stephanie Bogan: Clark.

445

01:06:29.430 --> 01:06:31.340

Stephanie Bogan: what's your next? One thing.

446

01:06:34.530 --> 01:06:39.530

Mark Quirk CFP, CIM: It's pretty simple. Get out there and see the centers of influence. I know.

447

01:06:40.147 --> 01:06:44.590

Mark Quirk CFP, CIM: We've spoken to 3 of them, and they're all excited to start working with us again.

448

01:06:44.800 --> 01:06:51.450

Mark Quirk CFP, CIM: It's actually liberating to hear how easy it can be done if you just get shown the right way. So thank you for that.

449

01:06:51.920 --> 01:06:53.170

Stephanie Bogan: Awesome. Great

450

01:06:53.400 --> 01:06:55.500

Stephanie Bogan: Mr. Bixler, how about you.

451

01:06:59.260 --> 01:07:01.820

Clark Bixler, CFP, ChFC: I think for me, it's determining



452

01:07:02.310 --> 01:07:05.446

Clark Bixler, CFP, ChFC: our next hire and

453

01:07:06.650 --> 01:07:15.710

Clark Bixler, CFP, ChFC: likely encouraging our service advisor to to be more of a lead advisor, and then replacing, backfilling his great work with with someone else.

454

01:07:16.500 --> 01:07:20.010

Stephanie Bogan: Good! Good. So you have that. What's your next? Do you have your next step in that.

455

01:07:24.200 --> 01:07:26.674

Clark Bixler, CFP, ChFC: just cutting a timeline for him to come out in front.

456

01:07:27.360 --> 01:07:29.190

Stephanie Bogan: Okay. When will you have that done by.

457

01:07:31.436 --> 01:07:36.179

Clark Bixler, CFP, ChFC: I would say. By the end of Q. 4, we would have a date for

458

01:07:36.600 --> 01:07:38.069

Clark Bixler, CFP, ChFC: for him to do so.

459

01:07:38.250 --> 01:07:39.649

Stephanie Bogan: Do you have a post? It nearby?

460

01:07:40.280 --> 01:07:40.766

Clark Bixler, CFP, ChFC: I do?

461

01:07:41.550 --> 01:07:44.200

Stephanie Bogan: All right. Everyone have a post. It nearby.

462

01:07:44.520 --> 01:07:47.049

Stephanie Bogan: Want you to write down your one thing

463

01:07:47.130 --> 01:07:53.510

Stephanie Bogan: and your next best step around that one thing. Those 2 things will keep your flywheel going

464

01:07:53.700 --> 01:07:57.589

Stephanie Bogan: might be tiny bit of fuel, but there is always a next best step



465

01:07:57.978 --> 01:08:04.990

Stephanie Bogan: the natural, next best step. If you literally do not know what it is, Brian Adam. Any guesses what that might be.

466

01:08:06.760 --> 01:08:11.680

Stephanie Bogan: I'm in the program. I'm stuck. I don't know what the next step is what's my next best step.

467

01:08:13.300 --> 01:08:14.729

Adam Cmejla, CFP®: Reach out, yeah.

468

01:08:14.730 --> 01:08:15.620

Stephanie Bogan: Chat.

469

01:08:16.025 --> 01:08:25.300

Stephanie Bogan: That is why we're here. You cannot. No one has yet, and I dare you to tell me that we have not shown up and done our part. We are here. If you need us.

470

01:08:25.460 --> 01:08:38.960

Stephanie Bogan: My job is to disrupt you enough, consistently enough, that you just don't go back to your routine when you're off of these calls, and we all know that's work is work for us, but it's the work for you is to not get distracted to not get diluted

471

01:08:39.050 --> 01:08:45.359

Stephanie Bogan: by the voices in your head. By this the demands of the day to day. And so I want you to leave this call

472

01:08:45.399 --> 01:08:48.240

Stephanie Bogan: clear on where you are in that growth journey.

473

01:08:48.330 --> 01:08:55.180

Stephanie Bogan: No bad spots, just we don't want blind spots. Get the difference. Where am I?

474

01:08:55.790 --> 01:09:07.690

Stephanie Bogan: What's my one thing with this conversation around, hey? I don't need to send rocket ships to the moon. I just need to figure out what's the one thing that's gonna right, optimize my practice or drive growth. If I'm there.

475

01:09:08.100 --> 01:09:09.960

Stephanie Bogan: write that on your post-it

476

01:09:10.410 --> 01:09:18.770

Stephanie Bogan: it might be picking that niche. It might be filling out the story framework. It might be



right doing that profitability analysis and adjusting your pricing

477

01:09:19.410 --> 01:09:30.789

Stephanie Bogan: right? It might be cultivating those Coi campaigns going back to them. It might be updating your website. There are no shortage of choices which can throw your brain because confused brains don't act.

478

01:09:31.370 --> 01:09:41.149

Stephanie Bogan: That's the biggest hurdle we have here. I'm gonna open up the deck. We're gonna talk a little bit more about next year, but I want to make sure, before we do that, that you leave this call with the post it.

479

01:09:41.200 --> 01:09:43.940

Stephanie Bogan: if you've got it, raise it up so I can see it.

480

01:09:44.560 --> 01:09:54.020

Stephanie Bogan: Circle of trust and accountability. Alright, guys! Good to see it. If you're if you're not on camera, I'm trusting you to make sure that you did it, or you do it. If you're in the car or on the walk.

481

01:09:54.229 --> 01:10:03.039

Stephanie Bogan: When you get back to the office, looking at that, every day will help your brain. GPS to right. This is the commitment I made. I need to follow through on it. So.

482

01:10:03.040 --> 01:10:05.259

Brian Voss: Share it publicly. If you've got.

483

01:10:05.260 --> 01:10:05.846

Stephanie Bogan: Share it.

484

01:10:06.140 --> 01:10:11.945

Brian Voss: If you've got someone else share what that one step is, gonna be publicly.

485

01:10:13.247 --> 01:10:20.200

Stephanie Bogan: Which is a great segue into. I'm gonna open up, not my calendar. Nobody wants to see my calendar right now. I am gonna open up

486

01:10:20.920 --> 01:10:22.450

Stephanie Bogan: the deck again

487

01:10:22.830 --> 01:10:27.989

Stephanie Bogan: just to give you guys information on next year's program.

488

01:10:31.480 --> 01:10:33.390



Stephanie Bogan: I can get this to share.

489

01:10:35.300 --> 01:10:36.240

Stephanie Bogan: There we go.

490

01:10:36.961 --> 01:10:45.519

Stephanie Bogan: Well, you're here. So you already know about all, all the game changing stuff that we have here. But what I want to talk about is some of the changes for next year.

491

01:10:46.140 --> 01:11:12.549

Stephanie Bogan: You keep hearing me talk about this 3 year roadmap you have in your program guidebook, right? The path where we've kind of mapped out if you did every lesson in order, right? Just right, formulaically, that is a path that will work, and you can follow it and feel good about it. That is the framework you should be following. Every step on that path has a section in that guidebook that gives you the lessons, the resources, the outcomes for you to reference.

492

01:11:12.720 --> 01:11:19.649

Stephanie Bogan: Right? If we're not using that, we want to make sure we come back to it. But next year, as I shared with you. We have a couple of big announcements.

493

01:11:19.710 --> 01:11:32.050

Stephanie Bogan: One which I have a slide on in here somewhere is that Michael Kitsis, as you know, has been a client of mine for 5 years. He's done different appearances at both lifestyle and leaders program, and for the last couple of years

494

01:11:32.220 --> 01:11:41.330

Stephanie Bogan: has really wanted to be a deeper part of the faculty. But you know that whole coach keeps you focused thing that that did not really work for my favor. I actually had to wait too.

495

01:11:41.739 --> 01:11:48.490

Stephanie Bogan: But this is about that saying yes to something means you have to say no to something else. So Michael had some breaks in his calendar

496

01:11:48.630 --> 01:11:55.939

Stephanie Bogan: and priorities, so he had an opportunity to take on something new, and he chose to take on limitless. So I'm very excited to share with you

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01:11:56.420 --> 01:12:06.969

Stephanie Bogan: the man in the blue shirt is gonna be joining us for both lifestyle and as Co. Faculty in leaders next year. So you will be seeing him at summits and in some of our quarterly calls

498

01:12:07.650 --> 01:12:13.170

Stephanie Bogan: just to bring again right? Just more depth of experience, and know how to the table for you guys.



499

01:12:13.672 --> 01:12:27.759

Stephanie Bogan: We will continue to have our 4 quarterly summits. Let's go back here. Which will be virtual again. The library has got the advanced lessons, but we're gonna be building out a 3 year version of that roadmap.

500

01:12:27.760 --> 01:12:29.420

Adam Cmejla, CFP®: Can you move your fathom? It's.

501

01:12:29.420 --> 01:12:31.529

Stephanie Bogan: Coming out there in the middle of that. Yep.

502

01:12:31.570 --> 01:12:41.590

Stephanie Bogan: not go. Let me see on my screen. This is not the 3 year version, this is just the core. If these are all the things that are on the path. So right, if you are looking for a checklist.

503

01:12:41.810 --> 01:12:56.339

Stephanie Bogan: this is essentially that checklist. Again, to Adam's point. There are one or 2 things in these areas that really move the needle, and everything else is about optimizing and growing around that. So we're essentially building that 3 year roadmap

504

01:12:56.694 --> 01:13:11.989

Stephanie Bogan: in a really cool, kinda right trail guide view. Think game board that you can follow. And then we're gonna kinda give you some recommendations about what order you can do those in based on where you are right. If you're starting out and you're in the rent and ramen phase.

505

01:13:12.390 --> 01:13:31.520

Stephanie Bogan: we're gonna be focusing on right this path in this order. If we're right already at a million, and we're just trying to get our lifestyle back. So we can figure out where to go from here. Right? We're gonna do things in a slightly different order so we're gonna give you a bit more of a structure around that roadmap. But the core learning platform essentially will remain the same

506

01:13:32.357 --> 01:13:41.429

Stephanie Bogan: core changes program structure. We're gonna still have the core virtual summits workshops went really great this year. So we will have.

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01:13:41.610 --> 01:13:43.430

Stephanie Bogan: Is this, the leaders deck?

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01:13:44.110 --> 01:13:47.010

Stephanie Bogan: This is the leaders deck, you guys need the lifestyle deck.

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01:13:50.809 --> 01:14:02.870

Stephanie Bogan: so we'll have those core summits we'll have the workshops which we're calling coaching camps, which are those 2 days? Roll up your sleeves, get work done. We've mapped out those



coaching camps so that you can essentially

510

01:14:03.020 --> 01:14:14.050

Stephanie Bogan: get through all of the core lessons over the course of 2 years. So if you wanted to like, map it out and be like, Hey, I will go to coaching camps, and I will be sure that I do these things.

511

01:14:14.475 --> 01:14:24.120

Stephanie Bogan: You can essentially map that out over the course of 2 years. And we're gonna have 4 calls each month. Every Monday is a different call. You do not need to attend them all.

512

01:14:24.220 --> 01:14:32.239

Stephanie Bogan: 1st Monday of the month will be our practice. Building calls, think conversations like this, right? Things that are related to your practice, strategies and growth

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01:14:32.750 --> 01:14:42.869

Stephanie Bogan: very light on the presentations. Much more. What's working, engaging, collaborating, right and diving into right. How you apply lessons in your practice.

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01:14:43.110 --> 01:14:52.540

Stephanie Bogan: Second call is always that mindset executive coaching those have gone really well this year for those of you who are in them. We're gonna slight twist. We're gonna take and create a topic

515

01:14:52.580 --> 01:15:14.459

Stephanie Bogan: about 20 min at the beginning of each section, hey? You know how is overwhelm showing up for you? How is that relationship to money showing up? How is your right control seizure and an ability to delegate showing up for you so that we can make sure that as a group, right, we're covering right the spots on the trail right? We're hitting the camps that we need to to make sure that you have a good

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01:15:14.490 --> 01:15:24.229

Stephanie Bogan: mindset and leadership foundation so that just a small change there that I think is gonna really help you guys start to apply mindset in more practical ways.

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01:15:24.660 --> 01:15:26.810

Stephanie Bogan: We'll have our standard office hours.

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01:15:26.840 --> 01:15:35.369

Stephanie Bogan: And then, in lieu of advisor cohorts which were great this year. What we really took away is, it's right peeling back the curtain and seeing

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01:15:35.630 --> 01:15:53.970

Stephanie Bogan: how people are applying things is really really valuable. So these are, gonna be advisor led spotlights. We'll be reaching out if you guys have areas where you've really nailed it right. If Brian obviously is nailed surges. We could have him come back and be like. Let me show you how I did it. Here's my calendar. Here's my letter. Here's my team



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01:15:54.130 --> 01:16:11.819

Stephanie Bogan: right. So there are a lot of ways you have applied, and our alumni have applied lessons, so they'll be coming back to talk about how they did it and doing spotlights on around different topics, so that you can right ask questions right of your peers around right? Just the nitty, gritty details about the how things are getting done

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01:16:12.433 --> 01:16:17.640

Stephanie Bogan: so not massive changes. But again, really just looking to optimize a.

522

01:16:18.140 --> 01:16:26.460

Stephanie Bogan: the big question that you all have. Brian did a great job of listing off all the questions that your clients have, particularly as they hit retirement.

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01:16:26.777 --> 01:16:39.270

Stephanie Bogan: We know the number one question you have here. When it comes to building your roadmap is, you know, what's my personalized version of that roadmap. And then what do I do next? And so we're really putting structure in place

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01:16:39.400 --> 01:16:42.820

Stephanie Bogan: to help you solve for that with next year's version of the roadmap

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01:16:43.573 --> 01:16:55.590

Stephanie Bogan: and then again mapping that through the workshops and through the different verge. Advisor avatars, if you will, so that you can start to kind of identify which of those most aligns with where you are in your growth journey.

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01:16:57.063 --> 01:17:05.549

Stephanie Bogan: Michael, as I said, we'll be here. I want you to really think about what your success story is right. What's the progress that you've made this year.

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01:17:05.590 --> 01:17:18.849

Stephanie Bogan: and what is gonna be the thing that moves the needle and makes the difference so that you does not mean you have to be a coach, or I have to put you on social media. But when you think about why you're here, it's because you have some version of that success story

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01:17:18.970 --> 01:17:42.749

Stephanie Bogan: that you ultimately want to get to. And our goal is to help make that possible. So the way that we're going to do that next year is you'll get information. There's a link in inbox insight with information on this year's lifestyle program. There are 2 versions. There is the full version which is all inclusive. There was a great deal of inner debate and dialogue with the team.

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01:17:42.850 --> 01:17:45.514

Stephanie Bogan: Michael coaches around this



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01:17:46.910 --> 01:17:52.129

Stephanie Bogan: We had the light version and the full version this year. And right, you get coaching, or you don't get coaching.

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01:17:52.270 --> 01:18:01.770

Stephanie Bogan: And I really just had to ask myself what kind of a coaching community I want. And I really want a coaching community where we get to talk to everyone if they have a need. And let's be honest, we kind of

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01:18:01.830 --> 01:18:08.900

Stephanie Bogan: if you are really stuck, we never, ever, ever let you stall out. That just does not happen here. So the core program

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01:18:08.960 --> 01:18:23.690

Stephanie Bogan: is the core program both of the coaching camps, because we essentially, in the ideal, want you to come, dig in and make sure you're connecting with coaches and peers to collaborate right. Roll up your sleeves, get this done, and really keep that flywheel moving.

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01:18:24.116 --> 01:18:31.570

Stephanie Bogan: And it includes the personal coaching support. So we'll do the check ins if you need support, we will be here. Whether it's me or the coaching team.

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01:18:31.620 --> 01:18:40.210

Stephanie Bogan: so that you're never sitting there going? Well, I don't know. Should I email, should I not? Should I ask for support, should I not? I just don't want that to be a question on the table.

536

01:18:40.370 --> 01:18:49.720

Stephanie Bogan: Adam can tell you sometimes it's a 10 min conversation that can make a radical difference, right? And your focus and your momentum. So we want to make sure we can support you on that.

537

01:18:50.091 --> 01:19:02.730

Stephanie Bogan: So the full program next year, accounting for that and for inflation, of course, will be 15,000 and the virtual program, which is essentially that core program without the workshops will be 12.

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01:19:04.100 --> 01:19:11.890

Stephanie Bogan: if you have any questions about that. All of the details are in the sales page and the enrollment information. That's an inbox we will send out

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01:19:11.960 --> 01:19:24.279

Stephanie Bogan: and email to you later this week. We are are setting all of our commitments for next year based on enrollment numbers. So we'll offer workshops for those coaching camps

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01:19:24.420 --> 01:19:32.790



Stephanie Bogan: and coaching capacity and calls will set it at right who's enrolled, plus a little bit extra for guests or people that you want to bring along.

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01:19:33.142 --> 01:19:47.179

Stephanie Bogan: But that's essentially kind of how we're gonna set the group for next year to make sure that everyone could get the support and the attention that they need. So that will be coming out, I think, later this week or early next week, but it's in inbox insights. If you want to get the sneak peek.

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01:19:47.360 --> 01:19:50.430

Stephanie Bogan: Brian or Michael will be joining us

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01:19:50.708 --> 01:20:01.580

Stephanie Bogan: in November for a call around the leaders group. If you're interested in that, he will be doing Co faculty with me next year, so he'll be at all of the leaders, retreats as well as in a bunch of the calls.

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01:20:02.075 --> 01:20:15.590

Stephanie Bogan: And then we'll be doing a special kickoff. Call with him for everyone that enrolls by October, so we can make sure we're just dialed in on where we are in enrollment, and the team can make all their plans for next year, and we can make sure that we are set up

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01:20:15.660 --> 01:20:18.000

Stephanie Bogan: to support you for success next year.

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01:20:19.186 --> 01:20:28.390

Stephanie Bogan: That's it. It's pretty straightforward again. Not a ton of changes, really, just taking all of the feedback that we've gotten from you. And really trying to optimize for that.

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01:20:28.907 --> 01:20:35.330

Stephanie Bogan: Do you guys have questions? I'm happy to answer them otherwise. You're welcome to move on to whatever is next in your days.

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01:20:39.030 --> 01:20:42.090

Stephanie Bogan: Questions answered. It's a quiet call today. Look at that.

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01:20:42.270 --> 01:20:53.969

Stephanie Bogan: Alright again, if you've got any questions you guys, that will be an inbox insights. If you've got any practice questions for Brian or Adam, I think we've got. What about 15 min left.

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01:20:53.970 --> 01:20:57.739

Adam Cmejla, CFP®: Yeah, we've got 15 min left. So if there are still things that people

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01:20:58.560 --> 01:21:01.549

Adam Cmejla, CFP®: and that people have questions on, we're happy to stick around and talk about it.



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01:21:01.550 --> 01:21:03.555

Stephanie Bogan: See if we missed any in

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01:21:04.200 --> 01:21:06.109

Adam Cmejla, CFP®: Active and lively chat. Today.

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01:21:06.320 --> 01:21:08.640

Stephanie Bogan: It was. You guys covered a ton over there.

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01:21:09.130 --> 01:21:16.350

Stephanie Bogan: Alright. Everybody have their one thing. Anyone have questions about their next steps. I went through those with Edwin. Anyone else want to go through any

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01:21:17.140 --> 01:21:18.450

Stephanie Bogan: need clarity.

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01:21:22.490 --> 01:21:25.579

Stephanie Bogan: You guys are staring at your screens intently.

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01:21:25.580 --> 01:21:35.899

Roshani Pandey | True Root Financial: Hey, Stephanie? I have a question. Do you? Do you have any offering for just the workshops? Just the the march and September workshops? Only.

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01:21:36.570 --> 01:21:45.420

Stephanie Bogan: We don't currently. But Alison will have final information on that. She's on holiday right now. So we may. It will depend on capacity.

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01:21:46.520 --> 01:21:49.499

Roshani Pandey | True Root Financial: Okay, so when will that information come out?

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01:21:49.964 --> 01:21:58.649

Stephanie Bogan: That will. When the information comes out later this week or next week, it'll be in there should be in there. But if you, if not, if you have any questions, just reach out to inbox.

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01:21:59.440 --> 01:22:00.100

Roshani Pandey | True Root Financial: Sounds good.

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01:22:00.470 --> 01:22:01.979

Clark Bixler, CFP, ChFC: Did I hear you say there's there's.

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01:22:02.215 --> 01:22:08.570



Stephanie Bogan: Well, well, let me take that back. I can't answer that question for you. If you are in legacy, you have the option of attending the workshops.

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01:22:08.914 --> 01:22:16.499

Stephanie Bogan: If you are not in legacy, if you're not enrolled in any program, you will not be able to attend any of the workshops because they are for the coaching community.

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01:22:17.660 --> 01:22:21.409

Stephanie Bogan: But that's what the legacy program is for. So that you have ongoing access.

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01:22:22.130 --> 01:22:27.540

Clark Bixler, CFP, ChFC: There's 2 core. There's a just basically an in person. And a virtual. Is that what I heard you say? Stuff.

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01:22:27.830 --> 01:22:33.530

Stephanie Bogan: Yeah, the the core program is the same the difference is one, the 2 workshops.

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01:22:33.550 --> 01:22:36.969

Stephanie Bogan: And then just right, just the level of one on one support.

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01:22:38.820 --> 01:22:43.270

Roshani Pandey | True Root Financial: Oh, so so if you don't enroll in the main program, then you cannot just attend the workshops.

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01:22:43.592 --> 01:22:46.820

Stephanie Bogan: If you enroll in legacy, you can attend the workshops.

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01:22:48.340 --> 01:22:50.570

Roshani Pandey | True Root Financial: Okay. And legacy is what.

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01:22:51.500 --> 01:23:00.489

Stephanie Bogan: Let. Oh, I'm sorry. I just realized that slide was not in there. I assume everyone I always assume everyone knows. So if you are in your 3rd plus year

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01:23:00.590 --> 01:23:02.099

Stephanie Bogan: of the program.

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01:23:02.481 --> 01:23:14.019

Stephanie Bogan: I have this core belief. Probably makes me a horrible business person, right? That you have right gotten the lion's share of the guts of the value. There's a lot more you can get, which is why people stay on

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01:23:14.150 --> 01:23:25.200



Stephanie Bogan: right for the community and the coaching and the collaboration. But kind of the guts of that tends to happen in the 1st couple of years. Right? And we are right. The goal is to build up that community because there's a lot that we can do together

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01:23:25.530 --> 01:23:28.569

Stephanie Bogan: as a legacy. If you're a year in year 3 on

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01:23:28.893 --> 01:23:43.319

Stephanie Bogan: you basically get ongoing access to the virtual program for 3,600. So drops way way down. Because again, we know a couple of things. One. I've never met anyone that said I hit my goal. I'm done nothing else to do here.

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01:23:43.320 --> 01:23:58.839

Stephanie Bogan: 2. We all value coaching and community on an ongoing basis and again making some ongoing shifts. We are, by the way, it's unofficial yet. But you guys give me some feedback and be on the lookout, for we're gonna try and do some regional events

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01:23:58.970 --> 01:24:04.659

Stephanie Bogan: for like gatherings, or get together around main events or different things, so that you guys can maybe get together

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01:24:05.080 --> 01:24:07.100

Stephanie Bogan: outside of those workshops

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01:24:07.470 --> 01:24:09.070

Stephanie Bogan: can be cool. To be able to do that.

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01:24:09.790 --> 01:24:18.240

Roshani Pandey | True Root Financial: So if you're not enrolled in the lifestyle program, and you just want to attend the workshops. That's not going to be an option next year, because it was an option this year.

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01:24:19.080 --> 01:24:22.330

Stephanie Bogan: That is correct. You have to be enrolled in at least legacy.

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01:24:26.790 --> 01:24:29.920

Roshani Pandey | True Root Financial: Why did you make that change? Because it was available this year.

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01:24:30.467 --> 01:24:52.429

Stephanie Bogan: Honestly, the answer is, it was a pilot we wanted to see like, hey did like. What did it take for the Events team. Was it a lot more work did we get good market penetration without right creating a lot of marketing buzz around it cause we just wanted to see where we thought it fit into the business model, and it worked great but we would really have to do a lot of work to drive attendance

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01:24:52.842 --> 01:25:00.190



Stephanie Bogan: and we made the decision that we want to spend all of our energy focusing on people who are in the community and supporting and growing them.

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01:25:00.300 --> 01:25:03.439

Stephanie Bogan: not on people who chose not to be part of the community.

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01:25:05.480 --> 01:25:08.689

Stephanie Bogan: But again, that's why we have the legacy program. So you have

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01:25:08.740 --> 01:25:11.629

Stephanie Bogan: that that kind of entry point that allows you to stay tuned

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01:25:15.850 --> 01:25:27.769

Stephanie Bogan: alright. It looks like we've got about 5 min left, and you guys are on fire this week you are making me carry. You're just so enthralled with today's conversation and 2025.

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01:25:27.980 --> 01:25:29.619

Stephanie Bogan: Yes, let's do it.

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01:25:30.130 --> 01:25:31.669

Stephanie Bogan: Kenneth. How are you doing today?

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01:25:33.820 --> 01:25:35.209

Stephanie Bogan: What's your one thing.

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01:25:35.890 --> 01:25:36.830

Kenneth Price: I'm sorry. What.

596

01:25:36.830 --> 01:25:37.999

Stephanie Bogan: What's your one thing?

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01:25:38.440 --> 01:25:42.669

Kenneth Price: Oh, my! One thing is surge meetings. I was actually just

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01:25:42.790 --> 01:25:46.810

Kenneth Price: typing in the chat. I'm still confused as to what the

599

01:25:47.190 --> 01:25:51.490

Kenneth Price: what the changes are. I know what I had for this year. I'm wondering

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01:25:51.570 --> 01:25:55.130

Kenneth Price: how that changes and what I need to sign up for next year.

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01:25:55.520 --> 01:25:56.959

Stephanie Bogan: What program are you in this year.

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01:25:57.380 --> 01:26:07.460

Kenneth Price: I don't know what it's called, but I know I was signed up for adam's coaching personal coaching as well as the workshops. The 2.

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01:26:07.460 --> 01:26:12.840

Stephanie Bogan: So you're you would just be in the lifestyle advisor program unless you didn't want to do the in person.

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01:26:13.187 --> 01:26:32.750

Stephanie Bogan: Some of you have budget constraints or young children. You just don't want to travel. And so that's why we have the step down to virtual. I am not gonna lie. We didn't step it down a lot, because we absolutely love and know that there's a ton of value in getting together. A lot of the magic happens. There's some really cool stuff. You make a ton of progress because you're away and you're focused.

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01:26:32.810 --> 01:26:41.859

Stephanie Bogan: And we recognize that not everyone has the budget or the the ability to do that. But we really do want to encourage that. Which is why we priced it that way.

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01:26:44.670 --> 01:26:50.290

Stephanie Bogan: So, Kenneth, you would just be in the core program unless right for budget or travel. You wanted to be in virtual.

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01:26:51.430 --> 01:26:52.280

Kenneth Price: Okay.

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01:26:52.540 --> 01:26:53.540

Kenneth Price: Thank you.

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01:26:53.540 --> 01:26:54.480

Stephanie Bogan: You're welcome.

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01:26:55.770 --> 01:26:59.660

Stephanie Bogan: Alright! Is everyone ready to schedule their next best step?

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01:27:00.710 --> 01:27:02.669

Stephanie Bogan: Great. Open your calendars.

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01:27:05.240 --> 01:27:06.469



Stephanie Bogan: put it in there.

613

01:27:06.910 --> 01:27:21.879

Stephanie Bogan: If it's not already in there. What is your next step on that one thing, if it is not in your calendar, if it is not in the system, ask my team. I say this much to their annoyance all the time. If it is not in the system, it doesn't exist.

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01:27:22.130 --> 01:27:24.950

Stephanie Bogan: Ask Leona how often I say that it's like.

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01:27:26.690 --> 01:27:32.289

Stephanie Bogan: But it's true when I need information right? Like that's what makes everything work

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01:27:32.440 --> 01:27:39.940

Stephanie Bogan: so right. If you put it in your calendar, it means you've actually made a commitment to showing up for it.

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01:27:40.170 --> 01:27:45.039

Stephanie Bogan: If you learn how to make and keep commitments to yourself

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01:27:45.840 --> 01:27:49.889

Stephanie Bogan: with what we give you here, you are unstoppable.

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01:27:50.010 --> 01:27:56.719

Stephanie Bogan: My job is to really lean into that. You're gonna hear a lot more this year. And you're definitely as we talk about mindset

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01:27:56.750 --> 01:28:18.290

Stephanie Bogan: and those calls each month, and really leaning in to make sure that we're really surfacing. And e even in a more prominent way, right? Those conversations, because those are the reasons that you're not already there. If you've been here for a year or 2, it's not that the framework doesn't work. It's not that the tools aren't there. It's not that the tactics aren't here. It's not that we aren't here to support you. If you ask.

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01:28:18.350 --> 01:28:21.290

Stephanie Bogan: it's because something is stuck in you.

622

01:28:21.830 --> 01:28:34.309

Stephanie Bogan: and our job is to help you figure out what it is on a day by day, moment by moment basis. We right try to teach you to ask those questions and have that an awareness and calls like these, we're constantly trying to surface those issues.

623

01:28:34.630 --> 01:28:52.969

Stephanie Bogan: And that's the goal of this community is to make sure that we are elevating our

thinking first, so that we're in a position to choose the tactics that are gonna best serve our ability to support our clients with deeper value to optimize and run really efficient practices, because what we know.

624

01:28:52.970 --> 01:29:05.069

Stephanie Bogan: what we know, that we know that we know, ladies and gentlemen, is, if we do that, we earn the right to enjoy the ride and the rewards, and if you're not there yet, with all the love

625

01:29:05.080 --> 01:29:09.029

Stephanie Bogan: it means, we haven't done all the work we need to do.

626

01:29:09.080 --> 01:29:14.190

Stephanie Bogan: We're distracted. We're over complicating it. We're not clear on what the one thing is.

627

01:29:14.240 --> 01:29:21.119

Stephanie Bogan: that's what I'm here for. That's what Adam's here for. That's what Brian's here for. I'm going to be looking at your check ins. I'm gonna be reaching out.

628

01:29:21.150 --> 01:29:27.900

Stephanie Bogan: We're on inbox. We are on tribe. We're not here cannot be the excuse. It can't be.

629

01:29:30.200 --> 01:29:36.959

Stephanie Bogan: What's your next best step? Put it in your calendar. When you've put it in your calendar, you can wave goodbye and leave. Until then. I'm watching you

630

01:29:39.210 --> 01:29:42.629

Stephanie Bogan: and make it an awesome week. Go spread. Some kindness

631

01:29:42.920 --> 01:29:44.210

Stephanie Bogan: really counts.

632

01:29:44.340 --> 01:30:00.445

Adam Cmejla, CFP®: Steph. Real quick question. Sorry there was a great ending, but I'm gonna bring it back to an administrative housekeeping question from Austin. I wanna make sure it gets addressed just in case anybody else has it? If next year is their 3rd year, do they have the option to do legacy, or is it after 3 years essentially.

633

01:30:00.710 --> 01:30:08.347

Stephanie Bogan: It is the 3rd year I actually threatened last year to make it year 3 year 4. And then I really thought about it. And I thought, Yeah.

634

01:30:09.710 --> 01:30:10.750

Stephanie Bogan: tier. 3



635

01:30:12.710 --> 01:30:25.450

Stephanie Bogan: years you could. There's still for most people there's loose ends that you're wrapping up. But right again, you're not in year 3. If you've done nothing for years, one and year 2 right? That would be an issue. We'll have talk. We'll talk long before then.

636

01:30:26.820 --> 01:30:32.090

Stephanie Bogan: So again, I don't anticipate that I'll change that. But yeah, we did keep it at year 3 this year. Good question.

637

01:30:33.250 --> 01:30:34.560

Stephanie Bogan: You're right. I did threaten to change.

638

01:30:34.560 --> 01:30:35.280

Adam Cmejla, CFP®: Good. Good.

639

01:30:35.510 --> 01:30:36.280

Adam Cmejla, CFP®: Okay.

640

01:30:39.650 --> 01:30:44.080

Stephanie Bogan: Any other questions. You guys still writing it down? Jeremy, do you have your next step in your calendar?

641

01:30:48.220 --> 01:30:49.420

Stephanie Bogan: Is that a yes.

642

01:30:49.420 --> 01:30:51.410

Jeremy E. Portnoff, MSFS, CFP®, CIMA®, CMT®: Jeremy, there's 2 of us.

643

01:30:51.770 --> 01:30:54.069

Stephanie Bogan: Jeremy Portnoth, PI have to say.

644

01:30:54.447 --> 01:31:05.010

Jeremy E. Portnoff, MSFS, CFP®, CIMA®, CMT®: I'm just working on onboarding my new hire and getting her trained on the system. So we're gonna be focusing on right capital this week, so

645

01:31:05.270 --> 01:31:08.925

Jeremy E. Portnoff, MSFS, CFP®, CIMA®, CMT®: I can start to get some of the support that I need and get some time back.

646

01:31:09.732 --> 01:31:13.780

Stephanie Bogan: Did you look in the practice library for training, plan and resources and things to help.

647



01:31:13.820 --> 01:31:22.709

Jeremy E. Portnoff, MSFS, CFP®, CIMA®, CMT®: Yeah, I've looked at all that. I have it all downloaded and saved. So I'm I'm I'm aware of it. I'm going to use it kind of loosely.

648

01:31:22.960 --> 01:31:27.919

Jeremy E. Portnoff, MSFS, CFP®, CIMA®, CMT®: It's kind of a rock and a hard place type thing. I don't have the time to go and like create.

649

01:31:28.080 --> 01:31:34.119

Jeremy E. Portnoff, MSFS, CFP®, CIMA®, CMT®: you know the like an actual plan. But I I know all the systems that I need to

650

01:31:34.702 --> 01:31:38.799

Jeremy E. Portnoff, MSFS, CFP®, CIMA®, CMT®: her set up on. So we're just gonna work through it step by step.

651

01:31:38.800 --> 01:31:53.379

Stephanie Bogan: Great. There's a 30, 60, 90 day training plan in there. I think there's even some samples. If you're gonna invest in one thing to set this person up for success. It is that you heard, Brian. I have done it right. Stay up till 10 or 11. If you need to like

652

01:31:53.500 --> 01:32:06.870

Stephanie Bogan: build that out because it's a forcing mechanism for you. What do I need to teach them? In the 1st week in the 1st month, in the 1st 90 days, and then they have a roadmap to be like, Hey, Jeremy, this is what we're supposed to be doing right now.

653

01:32:07.242 --> 01:32:13.449

Stephanie Bogan: So in bigger firms. It really helps because different people are teaching different things. And right, if it's you and a person.

654

01:32:13.530 --> 01:32:31.119

Stephanie Bogan: it gives you something to sit down to once a week and be like, let's look at this roadmap. It is the thing you'll want to not do because you're too busy. It is the anchor that will keep you from going adrift, like making sure that that training is focused is the fastest way to get that person up to speed.

655

01:32:31.150 --> 01:32:44.820

Stephanie Bogan: which is the antithesis of what you feel like doing. I totally recognize that that sounds impossible. But that is the discipline challenge is to make sure you've got at least that one thing to keep you anchored, and sit down once a week and look at it.

656

01:32:45.280 --> 01:32:48.123

Jeremy E. Portnoff, MSFS, CFP®, CIMA®, CMT®: This is the the 30, 60, 90.

657

01:32:48.530 --> 01:32:57.159



Stephanie Bogan: That's like your Mvp. If you just honestly guys, we talk about like all the bells. And if you just have a conversation with this person. What do we need to learn this week?

658

01:32:57.300 --> 01:33:09.209

Stephanie Bogan: Right? Let's check. In what problems did you have? What helped you like? Just that ongoing conversation when I on board people. I meet with them every day for 30 min, then 20, then 10, then it goes to weekly.

659

01:33:09.430 --> 01:33:20.120

Stephanie Bogan: If they're working directly for me, because, especially in a remote world, I need that like, I need to be right there to fill in all the blanks, because we're not in office together. I can't be like, Oh, yeah, here's a quick answer to that question.

660

01:33:20.160 --> 01:33:35.329

Stephanie Bogan: and I don't want people to go weeks learning or asking. I want to be like right there. So it's like we're right there with them. And then I go away. And I'm like, Oh, you needed something from me. Yeah, I can't get in line right like, then the dynamic shifts a lot.

661

01:33:35.700 --> 01:33:44.280

Stephanie Bogan: So something to think about is that person is either gonna be on a track which makes it a lot smoother, right? Or you're gonna kind of figure it out as you go.

662

01:33:44.790 --> 01:33:58.210

Stephanie Bogan: Mvp. Ladies and gentlemen, if you cannot implement a practice all the way that doesn't mean don't implement it. Just find the bare minimum that you can implement and try and leverage that as much as possible, because it will help Jeremy.

663

01:34:01.122 --> 01:34:17.129

Stephanie Bogan: You could also ask Chat Gpt. That's a good one. Right? Like, copy the training plan, paste it into Chat Gpt, and then ask Gbt to outline the duties for you within those timelines, for a fill in the blank role for a financial planning firm. And it will do it for you.

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01:34:17.310 --> 01:34:18.340

Stephanie Bogan: Problem solving.

665

01:34:18.670 --> 01:34:19.400

Jeremy E. Portnoff, MSFS, CFP®, CIMA®, CMT®: Okay.

666

01:34:19.400 --> 01:34:24.090

Stephanie Bogan: There you go. It'll get you at least 2 thirds of the way there, and then you can frame it out.

667

01:34:24.540 --> 01:34:34.349

Stephanie Bogan: Yeah, you guys, if you want to draft. If anything, take our stuff, cut and paste it, put in chat TV. Insert for this kind of client for this kind of firm, and it will give you really cool stuff.



668

01:34:35.120 --> 01:34:41.929

Stephanie Bogan: It's knowing what to put in, and then knowing the prompts. But if you take what we've got and you need to customize stuff is a great resource.

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01:34:43.510 --> 01:34:45.370

Stephanie Bogan: Jeremy, that should help a little bit.

670

01:34:45.630 --> 01:34:47.009

Jeremy E. Portnoff, MSFS, CFP®, CIMA®, CMT®: Okay. I'll take a look.

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01:34:47.010 --> 01:34:49.939

Stephanie Bogan: Awesome, all right. Everyone else have their one thing.

672

01:34:50.540 --> 01:34:51.979

Stephanie Bogan: Amy. How about you?

673

01:34:53.780 --> 01:34:55.240

Stephanie Bogan: Is it in the calendar?

674

01:35:00.540 --> 01:35:05.290

Amy Hall: Yeah. So my goal is to after we get off this phone call.

675

01:35:05.470 --> 01:35:13.590

Amy Hall: actually create my calendar link and then get it out to clients that for surge weeks I'm gonna do

676

01:35:14.430 --> 01:35:17.580

Amy Hall: 2 and a half weeks worth of search. So that's my.

677

01:35:17.580 --> 01:35:23.010

Stephanie Bogan: Yeah. And I think there's some good examples, emails and letters. Adams. Maybe Brian says a couple of others in there, if you you know.

678

01:35:23.010 --> 01:35:24.040

Amy Hall: Yeah, I have all that.

679

01:35:24.310 --> 01:35:25.819

Stephanie Bogan: Great. Yep, it's on.

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01:35:25.820 --> 01:35:27.130

Amy Hall: Calendar and a task.



681

01:35:27.130 --> 01:35:38.119

Stephanie Bogan: Great sometimes it's just making the decision to do it. Get that momentum going alright, ladies and gentlemen, we are at time great chatting with you today again. Get really clear on where you are in the growth journey.

682

01:35:38.190 --> 01:35:53.129

Stephanie Bogan: Don't overthink it. Don't over complicate it. Get really clear on what's gonna move the needle. What's your one thing? What's your next best step that is now in your calendar commitment made? We will see you next time. Be willing, be ready to check in

683

01:35:53.240 --> 01:35:54.370

Stephanie Bogan: talk to you soon.

