



UPCOMING EVENTS

OCT. 2025 LIMITLESS ENROLLMENT



UPCOMING COACHING CALLS

10.15 OFFICE HOURS

10.21 PERSONAL PEAK COACHING CALL
Relationship to Money with Coach Liz

10.28 COHORT CALL
with Coach Adam



USE ZOOM Q&A FOR TODAY'S QUESTIONS



LIFESTYLE

PEAK PRACTICE

COACHING CALL



OCTOBER 2024



Before Limitless, two big pain points were making exceptions for clients and not using my time wisely.

With Limitless, I got clear on my vision, hired to support my growth, and made big improvements in my business.



Taylor Schulte

Define Financial

3X GROWTH

3X TIME OFF

30%+ ANNUAL GROWTH

"Last year, if you add back in Saturdays, I had negative 4 days off. I knew I had too many clients, but I had never done anything about it. I was happy with my income, but not my time."

Jed Levene

Rockwater Wealth Management

\$1M PRACTICE

70 DAYS OFF/YEAR



"My biggest takeaway was learning I was the one standing in the way of my success. I knew I needed to do something different and wanted the know-how and expertise to get it done. I was tired of struggling alone. With Limitless, I fulfilled my dream of getting my pilot's license and buying a plane. Limitless helped me create success I never imagined possible!"

Adam Cmejla

Integrated Planning

5X GROWTH

8 WEEKS + FRIDAYS OFF

FULFILLED HIS DREAM



"Coaching helped me challenge my own thinking and create the biggest, most satisfying shifts in my business to date - a great testament to the power of mindset shifts and growing a team."

Michael Kitces

Kitces.com

10X GROWTH (TWICE) IN 5 YEARS

MORE TIME OFF THAN EVER!



"Before Limitless, I was struggling, stressed out, and on a treadmill that wasn't going anywhere. Three years later, following your roadmap, I've hit my \$1M/100 days off goal with the Limitless Virtual program. If I can do it, anyone can!"

Brian Voss

NBT Capital Management

\$1M PRACTICE

100 DAYS OFF/YEAR

ALL VIRTUALLY!



"Limitless has literally transformed my practice and life. Your terms are not overworked, overwhelmed, and underpaid. You've shown me there really is a better way."

Christy Raines

Azimuth Wealth Management

\$1M PRACTICE

30-HOUR WEEKS

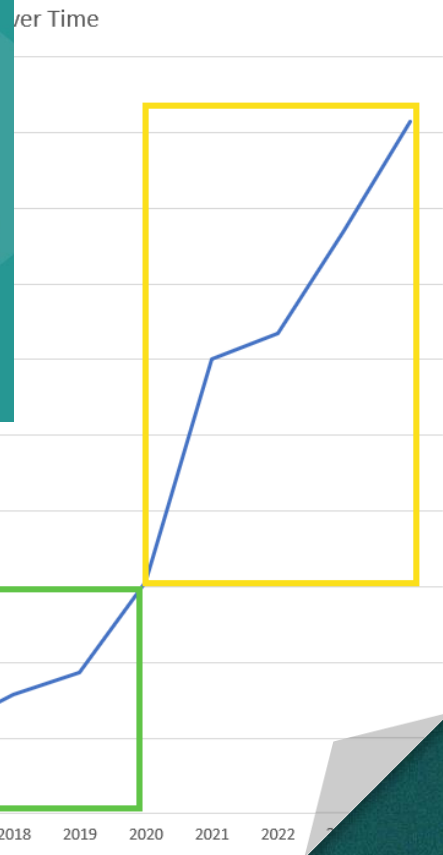
SUMMERS OFF



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Michael Kitces
Kitces.com

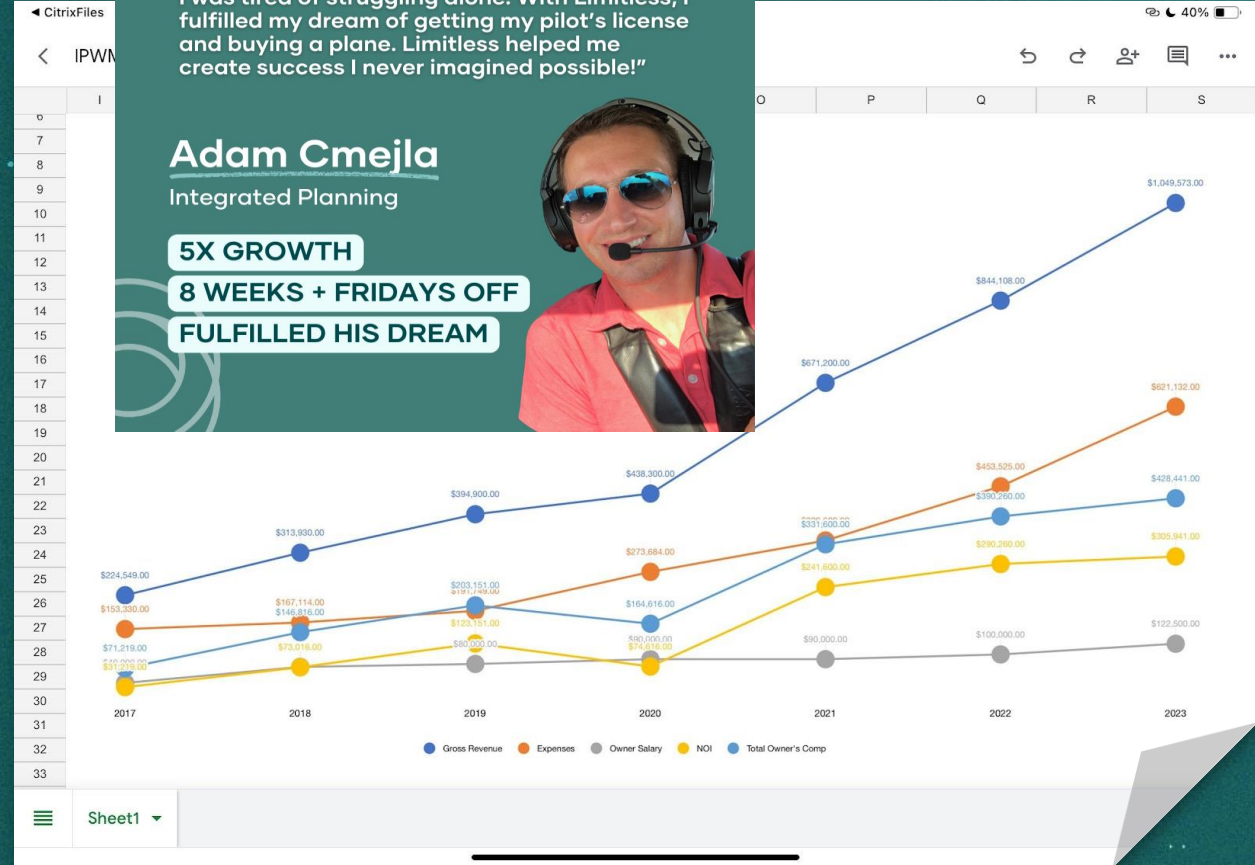
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Adam Cmejla
Integrated Planning

5X GROWTH
8 WEEKS + FRIDAYS OFF
FULFILLED HIS DREAM



BUILD YOUR \$1M/100 DAYS OFF PRACTICE

"Before Limitless, I was struggling, stressed out, and on a treadmill that wasn't going anywhere. Three years later, following your roadmap, I've hit my \$1M/100 days off goal with the Limitless Virtual program. If I can do it, anyone can!"

Brian Voss

NBT Capital Management

\$1M PRACTICE

100 DAYS OFF/YEAR

ALL VIRTUALLY!



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BREAKOUTS



BUILD YOUR WILDLY SUCCESSFUL PRACTICE

WITH THE TIME, FREEDOM,
AND LIFESTYLE TO ENJOY IT!



We're in the business of breakthroughs.
Are you ready for yours?

Designed for financial advisors and growing firms, our game-changing coaching programs hand you the proven roadmap to elevate your thinking, accelerate your growth, and create success that comes with the time and freedom to enjoy it!

SUMMIT-BASED LEARNING JOURNEY

Framework designed to maximize personal and professional growth through structured yet flexible learning.



Core Lessons

You will complete **24 core lessons** over the first two years, which will be spread across **4 Summits**. This structure ensures that you make systematic progress and master key concepts effectively.

Advanced Lessons

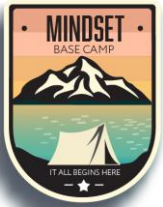
You have the freedom to choose from **120+ advanced lesson options** based on your unique interests and goals. This flexibility empowers you to tailor your learning experience, ensuring that the material is relevant and engaging for you.

Ongoing Learning

Optional reviews of core lessons are integrated into the summits to help **reinforce your understanding and retention**. This approach allows you to solidify your knowledge and address any areas where you may need additional support.

Personalized Path

Nothing is set in stone! You have the flexibility to jump between core and advanced lessons based on your interests and goals. By selecting the lessons that resonate with you, you can engage deeply with content that is meaningful to your career and personal development.



ELEVATE YOUR THINKING

THE SCIENCE OF SUCCESS

SELF-TALK FOR SUCCESS

OVERCOMING OVERWHELM

SAY GOODBYE TO IMPOSTER SYNDROME

Mastering Your Money Mindset

Marketing Mindset

Learning to Let Go (of Control)

6 Mindsets of Excellent Leaders

DESIGN YOUR MODEL PRACTICE

MY MODEL PRACTICE

NICHES & DIFFERENTIATORS

IDEAL CLIENT PROFILE

PRICING & PROFITABILITY

Finding Your Fee Model

Right-Sizing Your Client Base

Taming the 3 Transitions (fees, services, advisor)

TAKE CHARGE OF YOUR TIME

TAKING BACK YOUR TIME

ROCK STAR RIGHT HAND

MODEL CLIENT MEETINGS

CLIENT MEETING SURGES

High-Performance Happiness

Focusing 70% on Genius Work

Taking a 30-Day Summer Vacation

Success Shifting

CLEARLY COMMUNICATE VALUE

UNIQUE VALUE PROPOSITION

TELLING YOUR STORY

NO-STRESS PROSPECT PROCESS

ONE-PAGE FINANCIAL PLAN

Fabulous First Meeting

Overcoming Objections

Building a Breakout Brand

Branding Your CX

DELIVER EPIC CX & SERVICE

CLIENT SEGMENTATION

5-STAR SERVICE MODELS

OPTIMIZING ONBOARDING

CURATING YOUR CX

Right-Sizing Your Client Base

Client Advisory Boards

Client Engagement & Feedback

Human Side of Advice

STAFF FOR SUCCESS

STAFFING FOR SUCCESS

HIRING, TRAINING

COMPENSATION & CAREER PATHS

BUILDING & MANAGING TEAMS

Managing Performance

Hiring a Service Advisor

Building Virtual Marketing Team

Managing Advisor Capacity

OPTIMIZE YOUR OPERATIONS

OPTIMIZING OPERATIONS

TAMING YOUR TECH STACK

CHECKLIST EVERYTHING

CRM OPTIMIZATION

The Advisory Firm of The Future

Applying AI in Your Practice

Cybersecurity Best Practices

Leveraging 3rd Party Partners

GEARING UP FOR GROWTH

REFERRALS ROADMAP 101

CULTIVATING COIs

RAMPING UP CLIENT REFERRALS

MAP YOUR MARKETING PLAN

Choosing Your Channels

Websites That Work

Building Your Marketing Funnels

Social Media Savvy

RUN PRACTICE LIKE A BUSINESS

VISION FOR SUCCESS

ONE-PAGE BUSINESS PLAN

LAUNCH BUSINESS PLANNING

KPI BENCHMARKING

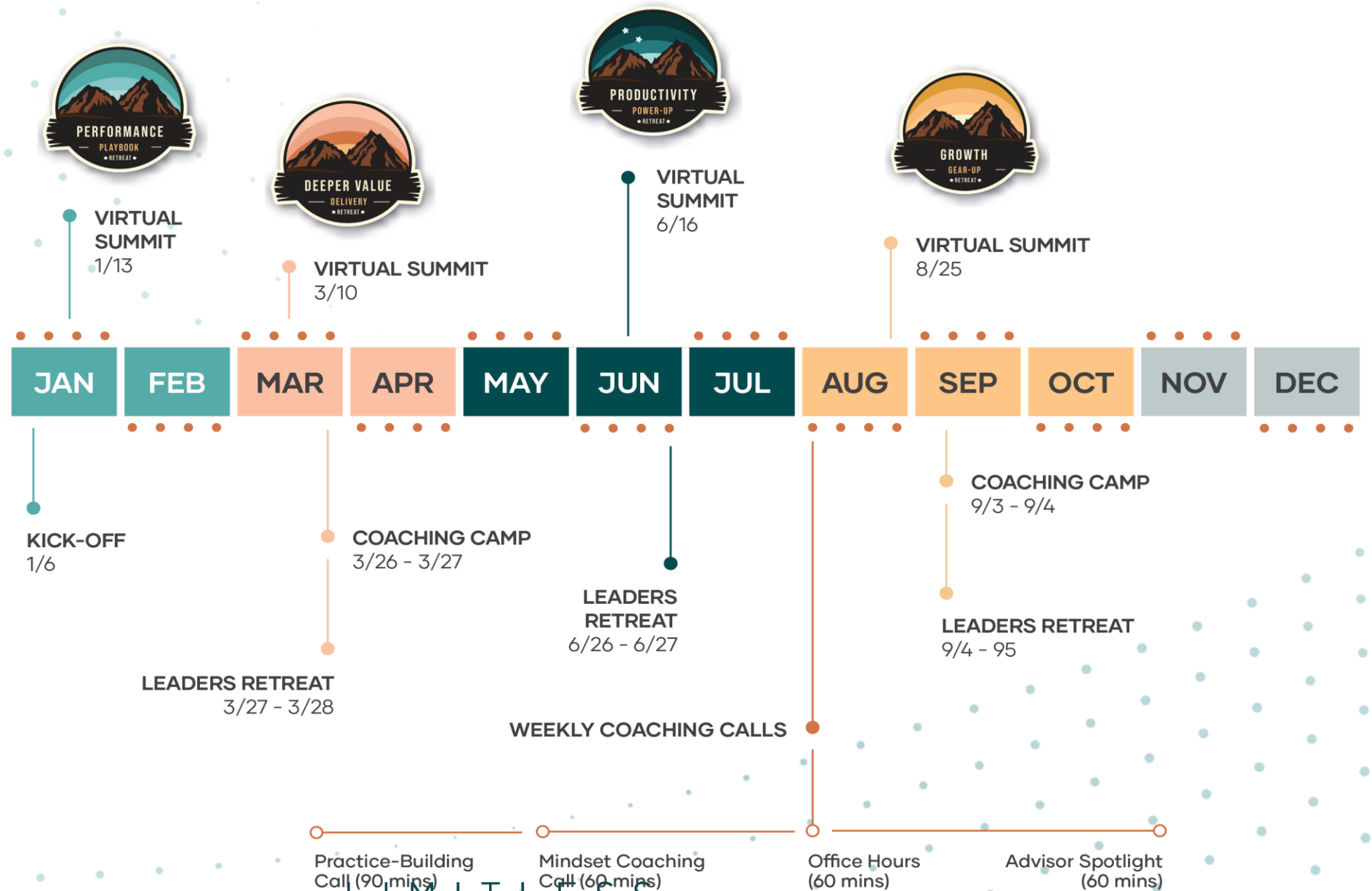
Curate a CEO Mindset

Find your Inner CFO

Optimize Performance

Invest in Yourself

2025 LIMITLESS TIMELINE



Limitless LIFESTYLE



📅 January to December 2025

Tuition: \$15,000*

Deposit: \$1,500

Monthly payment: \$1,125 (12 months)

*\$15,000 with partner code | \$18,000 without partner code

[SIGN ME UP](#)

What's waiting for you inside the Limitless LIFESTYLE program:

A game-changing coaching program led by Stephanie Bogan, alongside Michael Kitces and alumni coaches who have successfully built a 1M/100 days off practice using the Limitless roadmap:

🗺️ Roadmap to Success

A step-by-step roadmap for building your wildly successful \$1M practice with 50%+ EBOC and 100 days off per year.

📅 Accountability Check-ins

Personal accountability check-ins to help you stay focused and on track.

👤 Personal Coaching Support

Personalized coaching support helps you apply what you learn and maintain momentum.

📁 Proven Practice Resources

Access to the Limitless Practice Library—filled with resources, templates, and strategies that will help you grow and streamline business operations across 9 practice shifts.

🌐 Growth-Minded Community

Access to our tight-knit community of growth-minded advisors for peer support, accountability and collaboration.

📍 Virtual Coaching Summits (Quarterly)

Quarterly, full-day Coaching Summits deliver the no-fluff, mindset-shifting, practice-building training you need to execute your roadmap.

- ✓ **Q1 Performance Virtual Summit:** January 6
- ✓ **Q2 Value Virtual Summit:** March 10
- ✓ **Q3 Productivity Virtual Summit:** June 16
- ✓ **Q4 Growth Summit:** August 25

🏕️ 2-Day Coaching Camps (Spring & Fall)

Gather live with coaches and the community each Spring and Fall to remove distractions, roll up your sleeves, and get to work applying what you learn.

- ✓ **Spring Coaching Camp:** March 26-27 (Charlotte, NC)
- ✓ **Fall Coaching Camp:** September 3-4 (Denver, CO)

📞 Game-Changing Coaching Calls (Weekly)

Every Monday offers a unique coaching experience to accelerate your success and expand your well-being:

- ✓ **Practice-Building Call (90 mins):** Group coaching delivering actionable insights and practice-building strategies.
- ✓ **Mindset Coaching Call (60 mins):** Elevate your thinking, overcome your internal obstacles, and tackle mindset challenges to accelerate your success
- ✓ **Office Hours (60 mins):** Share challenges, ask questions, and get personal feedback to help you keep moving forward.
- ✓ **Advisor Spotlight (60 mins):** Get behind-the-scenes looks at how advisors have successfully applied Limitless strategies (and how you can too).

Introducing the Limitless VIRTUAL Program

 January to December 2025

Tuition: \$12,000*

Deposit: \$1,500

Monthly payment: \$875 (12 months)

*\$12,000 with partner code | \$15,000 without partner code

[SIGN ME UP](#)

For those who want the benefits of Limitless LIFESTYLE but prefer a virtual format, Limitless VIRTUAL offers the core program with group coaching and virtual-only access.

VIRTUAL members do not attend the 2-Day Coaching Camps in the Spring and Fall, preferring to work on their own.

You're a good fit for Limitless VIRTUAL if you:

- ✓ Have a conservative budget
- ✓ Prefer to avoid travel time
- ✓ Are able to lock in and make progress on your own

Limitless LEADERS



📅 January to December 2025

Tuition: \$33,000*

Deposit: \$3,000

Monthly payment: \$2,500 (12 months)

*\$33,000 with partner code | \$36,000 without partner code

SIGN ME UP

What's waiting for you inside the Limitless LEADERS program:

A game-changing coaching experience led by Stephanie Bogan, alongside Michael Kitces designed to help growth-minded leaders of 7+ figure firms accelerate their success and expand their well-being:

📍 Roadmap to Success

A step-by-step roadmap to disrupt your thinking, optimize your practice, scale your growth, and transform your practice into a business that maximizes value, margins, and joy.

📅 Strategy Consulting w/ Stephanie

Get expert guidance to help you set strategy, scale growth, and step up your leadership in one-on-one consulting calls (scheduled 2x year, as needed).

🗣️ Monthly Coaching Calls

Your Practice Coach will provide personalized touchpoints to give you the expertise, guidance, and accountability you need to move forward with confidence.

📖 Proven Practice Resources

Access to the Limitless Practice Library - filled with proven resources and shortcuts to help you run, grow, and optimize your practice.

🌐 Growth Minded Community

Join a tight-knit community of growth-minded peers for sharing, collaboration, and accountability.

🏠 Limitless LIFESTYLE Program

You and your team get full access to the Limitless LIFESTYLE program, including seats for you + a guest at our 2-Day Coaching Camps. You'll attend selected camps based on your roadmap. Attendance is optional and will be decided with your Practice Coach.

- ✓ **Spring Coaching Camp:** March 26-27 (Charlotte, NC)
- ✓ **Fall Coaching Camp:** September 3-4 (Denver, CO)

⚡ THREE 2-Day Leaders Retreats (Spring, Summer & Fall)

Led by Stephanie Bogan and Michael Kitces to disrupt your thinking and provide deeper insights and coaching to help you develop new levels of personal and business mastery.

- ✓ **Leaders Spring Retreat:** March 27-28 (Charlotte, NC)
- ✓ **Leaders Summer Retreat:** June 26-27
- ✓ **Leaders Fall Retreat:** September 4-5 (Denver, CO)

🏠 FOUR 1-Day Virtual Coaching Summits

Full-day Coaching Summits deliver the no-fluff, high-ROI training you'll need each quarter to execute the next step of your roadmap.

- ✓ **Q1 Performance Virtual Summit:** January 6
- ✓ **Q2 Value Virtual Summit:** March 10
- ✓ **Q3 Productivity Virtual Summit:** June 16
- ✓ **Q4 Growth Summit:** August 25

Limitless LEGACY



📅 January to December 2025

Tuition: \$3,600

Deposit: \$0

Monthly payment: \$300 (12 months)

[SIGN ME UP](#)

What's waiting for you inside the Limitless LEGACY program:

Roadmap to Success

A step-by-step roadmap to disrupt your thinking, optimize your practice, scale your growth, and transform your practice into a business that maximizes value, margins, and joy.

Proven Practice Resources

Access to the Limitless Practice Library - filled with proven resources and shortcuts to help you run, grow, and optimize your practice.

Good Vibes Tribe

Ongoing access to our online member community for ongoing coaching, collaboration, and accountability.

Limitless VIRTUAL Program

You and your team get full access to the Limitless VIRTUAL program, including seats for you + a guest at our quarterly Coaching Summits. We'll deliver the no-fluff training you'll need to implement strategic changes with confidence.

- ✓ **Q1 Performance Virtual Summit:** January 6
- ✓ **Q2 Value Virtual Summit:** March 10
- ✓ **Q3 Productivity Virtual Summit:** June 16
- ✓ **Q4 Growth Summit:** August 25

Exclusive MASTERS CIRCLE Calls

We'll hold 2-4 Legacy & Leaders only MASTERS CIRCLE calls with me, **Michael Kitces**, and **other industry gurus** to give you a front-row seat to talk with leading experts, get their latest thinking, and stay ahead of the latest trends and tactics for elevating your work, wealth and well-being.

OPTIONAL ADD-ON: 2-Day Coaching Camps (Spring & Fall)

Gather live with coaches and the community each Spring and Fall to remove distractions, roll up your sleeves, and get to work applying what you learn.

- ✓ **Spring Coaching Camp:** March 26-27 (Charlotte, NC)
- ✓ **Fall Coaching Camp:** September 3-4 (Denver, CO)



The biggest change in my life has been the mantra: What you focus on expands. Since Limitless, I have changed firms, become partner, and focused my time doing work that I love while creating a pipeline in my business. And I'm showing up as a much stronger leader at work in ways that make me far more present at home. Now I don't feel like I have to choose between my firm's financial success and my family. I'm leading a no-limits business and life that just keeps getting better.

- Tiffany Charles, Destiny Capital



The number one win I received from the Limitless program is that I am no longer burned out. I went from being so overwhelmed I couldn't sleep at night to taking 60 days off last year to travel to six different countries.

My prospect pipeline is as robust as ever, I'm getting paid what I'm worth, and I'm taking more time off than ever. If you want success that gives you balance, don't hesitate to join Limitless. Having the business and life you want is really the goal, and it really is possible.

- Cathy Curtis, Curtis Financial Planning



Before I joined Limitless, I was stuck. I was young, a mom with two kids in a bad partnership. I had a vision of opening my own office, but I had no idea how and no confidence to do it.

Now, I'm making the same money working half the time (30 hours/week) with my own office and staff.

- Tanya Nichols, Align Financial

