

LIMITLESS Coaching Call Transcript

December 2nd, 2024
Peak Practice Coaching Call

67
00:06:07.280 --> 00:06:11.550
Stephanie Bogan: All right. I'm gonna begin kick us off.

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00:06:17.735 --> 00:06:23.200
Stephanie Bogan: and everyone is joining our last practice call of the year. Hello.

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00:06:23.200 --> 00:06:24.130
Adam Cmejla, CFP®: Aw.

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00:06:24.130 --> 00:06:25.732
Stephanie Bogan: Good to see you. I know

71
00:06:26.020 --> 00:06:30.676
Stephanie Bogan: the good news is for joining us next year. There's just one but few weeks away, but

72
00:06:31.810 --> 00:06:42.140
Stephanie Bogan: you're gonna have to get through the last 2 weeks of the year on your own. Those are mine. I'm off. Oh, Isaiah, love the sweater I was looking for you in the thank you, man, look, you guys.

73
00:06:42.140 --> 00:06:42.780
Isaiah Real: Hello!

74
00:06:42.780 --> 00:06:47.850
Stephanie Bogan: We are having our ugly Christmas sweater contest today. Do not forget.

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00:06:48.100 --> 00:06:57.750
Stephanie Bogan: So I just want to point out that I am here in my Christmas unicorn sweater, which I will reveal fully to you in about moments

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00:06:57.860 --> 00:06:59.120
Stephanie Bogan: in but moments

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00:07:00.050 --> 00:07:05.240
Stephanie Bogan: alright, I'm gonna move. Hold on, waiting room. You guys don't need to see all that

alright.

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00:07:05.290 --> 00:07:10.960

Stephanie Bogan: everyone ready for our closing call of the year. Ken mark, Tim, Julie, you guys ready.

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00:07:10.960 --> 00:07:11.590

Adam Cmejla, CFP®: I forgot I had.

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00:07:11.590 --> 00:07:40.729

Stephanie Bogan: Alright. So this is our last call of the year, as we like to do. It's our ugly Christmas sweater contest and reminder to take your survey. For a couple of reasons. One. It's fun and festive. It could be your Hanukkah sweater, your Kwanzaa sweater. I don't care. It's really your celebrate the holiday sweater. I am not eligible to win. If you've been around for any period of time, you know that I wear the same sweater every year. So that's kind of cheating, but this is my Christmas sweater

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00:07:40.730 --> 00:07:47.979

Stephanie Bogan: I want to point out. I think I was doing pretty good to find a unicorn Christmas sweater with glitter. It's very Stephanie. Ask

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00:07:48.469 --> 00:07:53.850

Stephanie Bogan: so that's mine, Isaiah. I see your nice Christmas sweater there, Adam Scott, on Adam. Did you just throw on.

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00:07:53.850 --> 00:07:56.040

Adam Cmejla, CFP®: I did. I forgot that I had this now.

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00:07:56.040 --> 00:07:56.380

Stephanie Bogan: Theory.

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00:07:56.380 --> 00:08:08.341

Adam Cmejla, CFP®: This doesn't. This doesn't do like. I'd have to have Andrea standing next to me because she has the green one that says, Why is the carpet all Red Todd, all wet, Todd. No, Margo. So yes, it's a little bit of a

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00:08:08.620 --> 00:08:09.310

Stephanie Bogan: I love it.

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00:08:09.310 --> 00:08:10.886

Adam Cmejla, CFP®: Joint effort in that.

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00:08:11.280 --> 00:08:17.080

Stephanie Bogan: Yeah, I, Adam, I want to see you in one like on the screen with the tensile and the balls like that would be that'd be worth.



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00:08:17.080 --> 00:08:24.750

Adam Cmejla, CFP®: I used to have in college. I did one where we strung lights on it, and I had a battery pack anchored to the back. So I was literally all lit up.

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00:08:25.030 --> 00:08:26.750

Adam Cmejla, CFP®: but it came with free beer. So yeah.

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00:08:26.750 --> 00:08:40.420

Stephanie Bogan: I think I want to get one of those for the. I want to get one of those go skiing in it where you just turn on the lights Christmas sweater over your bib, and you're just like rolling down the mountain unless you fall, and then it's like that tumble of lights. That would be me like, tumble

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00:08:42.090 --> 00:08:49.480

Stephanie Bogan: yeah, for those of you who are joining us next year. We will be releasing information.

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00:08:49.660 --> 00:09:01.810

Stephanie Bogan: and our Park city ski get together, which will very likely be sometime in February, early March. So stay tuned for that. If you have your ugly Christmas sweater on, I'm gonna do

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00:09:02.000 --> 00:09:06.509

Stephanie Bogan: gotta do the I have to do full screen viewing here with everyone so I can see

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00:09:07.780 --> 00:09:11.310

Stephanie Bogan: alright. So Adam's got his Isaiah.

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00:09:11.760 --> 00:09:13.970

Stephanie Bogan: Who else has an ugly Christmas sweater.

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00:09:14.050 --> 00:09:15.980

Stephanie Bogan: Are the rest of you too proud?

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00:09:19.450 --> 00:09:34.290

Stephanie Bogan: All right, we're going to work on that next year. Christmas spirit, or whatever you celebrate, is really important, as we like to say here at limitless. We take our work very seriously. We really try hard not to take ourselves too seriously, as it is evidenced by my

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00:09:34.867 --> 00:09:47.079

Stephanie Bogan: my Christmas unicorn sweater in case anyone missed it. Because we're all joining like. Look at that! How is that for holiday glitter, spirit. I'm just saying like, you gotta take it up a notch to put on a unicorn and glitter for Christmas.

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00:09:47.490 --> 00:10:08.460

Stephanie Bogan: Alright, if you have not, please scan that QR code and take your end of your survey.

Feedback is our friend, as we like to say around here. It really does help us understand where we really nailed it this year, where there are opportunities for improvement. If you are joining us next year you can be prepared for and expect

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00:10:08.960 --> 00:10:20.990

Stephanie Bogan: a couple of pretty significant differences one. We went back through all the data from this year and we do all the things that we say we're gonna do. But I did happen to notice that the data says

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00:10:21.401 --> 00:10:31.450

Stephanie Bogan: That some contingent of people will quietly sit on the sidelines. I get emails from you every year saying I did all these amazing things, even though I was sitting quiet in the back of the call.

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00:10:32.472 --> 00:10:58.419

Stephanie Bogan: And then there are a few people that don't. They just sit quiet on the sidelines. So we have that data now over a couple of years. So as many of you know, we implemented the limitless works guarantee next year, which is basically a commitment that says limitless works. If you do right, if you go through the program. You follow the steps, and you do not see improvement in your practice in excess of your fees. We will refund your tuition.

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00:10:58.420 --> 00:11:06.859

Stephanie Bogan: Now, obviously, that's a pretty big commitment. So you can imagine that we've taken all that data and upped our engagement model for next year

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00:11:07.542 --> 00:11:20.259

Stephanie Bogan: everyone in limitless has access to personal coaching. I do not ever. I looked at all the data I thought about how we felt. And here's what I know. Adam can tell you. Leland can tell you, Isaiah can tell you.

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00:11:20.630 --> 00:11:44.200

Stephanie Bogan: Jim can tell you sometimes a 20 or 30 min. Call with a coach whether it's me, or an Adam or right, someone else can just be the thing that gets you unstuck. You do not necessarily need or need to pay for deeper month to month or personal implementation. But what we know is that giving you that support is kind of like putting an oil on the track. It really helps you move along.

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00:11:44.480 --> 00:12:11.300

Stephanie Bogan: So if you are in the program next year, you'll see that pretty significant difference. We're gonna we have a new 3 Year roadmap, which I think most of you have seen that really maps out how to get to the program in Year One. Here is the recommended path. I think of that as your foundations. And then alumni years, right here are the options, and then we're actually breaking those down by avatar for you a little bit. So if you're

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00:12:11.550 --> 00:12:29.180

Stephanie Bogan: starting out and you're more focused on growth, there'll be a version for you. You're like, Hey, I'm already at a million dollars. And I just need my time and my simplicity back right? You're gonna go through the core program. But there might be things that you do a little bit sooner in year, one, or in those other years than someone who's new.



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00:12:29.180 --> 00:12:48.929

Stephanie Bogan: And so I'm literally Michael and I spent a day mapping out in advance of future proof. We got together and mapped out the lifestyle leaders roadmap for the next 3 years. So it literally lays out all the lessons and in lifestyle. We'll give you avatar versions of that. If you're joining us for leaders. It's that structured 3 year roadmap that you're used to seeing at this point. Or we'll see next year.

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00:12:50.082 --> 00:13:14.367

Stephanie Bogan: So the survey is really helpful, because to my point, like we look at that data, we scour every bit of it. And every year we make improvements and changes, and those are many of the changes that you'll see next year are based on feedback that we got this year and based on your Qcis and your check ins this year, a number of you said, Hey, it would just be nice to do. I get a call. Do I not get a call?

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00:13:14.840 --> 00:13:29.930

Stephanie Bogan: every call we say right, if you need help or you're stuck. Please please reach out. But we wanted to kind of take that question, mark away so that we can put you on that track. So we'll be working on our roadmaps in January. So you have your game plan for the year that's personalized to you.

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00:13:30.204 --> 00:13:46.939

Stephanie Bogan: And then, as you're used to write quarterly summits, our monthly calls, and then coaching camps around implementation. So if you haven't taken the survey, please scan that QR code and do me a solid and give me your feedback so that we can continue to look at that data and information as we continue to improve the program.

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00:13:47.800 --> 00:13:58.629

Stephanie Bogan: Alright. Well, I would say that some of you are gonna win the ugly Christmas sweater. But it's only the coaches and the guests who have the Christmas sweater. So I guess Isaiah, by default wins.

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00:13:59.910 --> 00:14:02.139

Stephanie Bogan: Ron, you guys, you gotta give them a solid.

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00:14:02.340 --> 00:14:18.009

Stephanie Bogan: Do appreciate that, Isaiah. I just want to say there is something about all in. Not that you have to wear an ugly Christmas sweater, but for those of you joining next year. What you'll notice is that the people who in this the success stories that we share both in calls.

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00:14:18.140 --> 00:14:38.040

Stephanie Bogan: Certainly the ones that you see in emails or on social are people that are all in it does not mean that they're at the front of every call asking questions. It means that they're present. They're engaged, and they are taking action consistently on the things that we teach at limitless, and what we know is, if you work the plan.

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00:14:38.040 --> 00:14:49.210

Stephanie Bogan: the plan will work. If it's not working. That means there's some breakdown in the



person, the process or the platform, and we talk all year about all the resistance that you face

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00:14:49.340 --> 00:15:00.440

Stephanie Bogan: when trying to create change and improvement in your practice. It's hard to do on your own. It's hard to do in a community, but the goal right is for us to have that that support system in place to help you

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00:15:00.610 --> 00:15:10.459

Stephanie Bogan: move through that. So we will be awarding Isaiah, the Christmas sweater and we're gonna kick off this year's wrap. Call with 3 success stories

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00:15:10.846 --> 00:15:31.710

Stephanie Bogan: Leland, Jim and Isaiah are gonna share their experience through limitless this year. Talk about where their wins occurred. There were lots of them. These kind of the big ticket items, and my invitation to you as they go through each of these is one really pay attention to how their story relates to yours, some things will be the same, some things will be different.

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00:15:31.810 --> 00:15:56.180

Stephanie Bogan: But what's not different is their desire to change and grow, their practice, their struggle with time and focus and accountability right? And so feel free to ask questions. They've got examples of different things. They've implemented that they can show you. So each of them are going to kind of share their experience and limitless the changes that they made, the impact that it had. And my hope is that you can get

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00:15:56.180 --> 00:16:06.539

Stephanie Bogan: insights around how you've implemented or things that you can implement to create those same kind of effects again, feel free to ask questions or drop notes in the chat. Adam and I will kick in as we go.

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00:16:06.730 --> 00:16:08.459

Stephanie Bogan: Lin, do you want to kick us off.

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00:16:09.510 --> 00:16:21.070

Leland Gross, CFP® EA: Sure. Thank you. This has been my 1st year in limitless so all I knew was last fall, so a little over a year ago that I was feeling like

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00:16:21.090 --> 00:16:22.910

Leland Gross, CFP® EA: I am throwing so many

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00:16:23.160 --> 00:16:28.170

Leland Gross, CFP® EA: things at walls, and don't even know what's sticking or what's not sticking. And I just

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00:16:28.300 --> 00:16:37.939

Leland Gross, CFP® EA: really lacked clarity, and I could see, you know, I had some steady growth. I

wasn't like failing in my business, but I just didn't have a sense of, you know, solid

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00:16:38.060 --> 00:16:55.150

Leland Gross, CFP® EA: peace or confidence in what I was building. And so came into limitless, was really excited about it. Did the 1st summit got really overwhelmed trying to do everything at once, which was helpful to then later. Have Stephanie say, you know

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00:16:55.610 --> 00:17:13.939

Leland Gross, CFP® EA: you're only in your 1st year, so like follow the 1st year roadmap. You're not trying to do legacy and and leader, and like all these other pieces of this yet, like just, you know, road runner like Rip off and deploy. Just figure out what you need to do. And so kind of went back through and looked at

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00:17:14.470 --> 00:17:20.499

Leland Gross, CFP® EA: the I'm gonna space on the name of it. But when you kind of grade your practice and it gives you the green, yellow, red.

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00:17:21.609 --> 00:17:22.019

Adam Cmejla, CFP®: Austic.

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00:17:22.020 --> 00:17:28.080

Leland Gross, CFP® EA: The diagnostic and used that as my initial like, okay, what do I need to focus on? So a lot of it was around

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00:17:28.319 --> 00:17:33.850

Leland Gross, CFP® EA: growth and dived into the, you know lessons. I'm I'm very much like a self

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00:17:34.010 --> 00:17:38.130

Leland Gross, CFP® EA: pace person. So having the library of lessons was so helpful for me.

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00:17:38.695 --> 00:17:48.830

Leland Gross, CFP® EA: And I feel like we at my practice, really implemented a solid growth engine, figured out what was working, started tracking numbers, tracking the data.

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00:17:49.209 --> 00:17:55.690

Leland Gross, CFP® EA: And it has been, you know, night and day, as far as how I feel about it, and as far as how the numbers go. So

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00:17:55.990 --> 00:18:04.610

Leland Gross, CFP® EA: you know our revenue increased by over a hundred \$1,000 this year. Most of that came in the latter half of the year. Once we really started implementing

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00:18:04.780 --> 00:18:07.050

Leland Gross, CFP® EA: some of this predictable.



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00:18:07.280 --> 00:18:13.055

Leland Gross, CFP® EA: It's just the law of large numbers if you are doing it. If, like the inputs and the outputs make sense,

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00:18:13.410 --> 00:18:27.859

Leland Gross, CFP® EA: and my average revenue per client increased by \$2,500 per client. Most of that is due to increasing our fees to what makes sense based on client profitability. And some right sizing so increasing clients fees.

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00:18:27.970 --> 00:18:33.880

Leland Gross, CFP® EA: We did have an interesting situation where some of our we had so many clients below our new fees

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00:18:33.950 --> 00:18:35.350

Leland Gross, CFP® EA: that if we had just

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00:18:36.030 --> 00:18:44.520

Leland Gross, CFP® EA: immediately right sized everyone, I think we genuinely would have lost such a big chunk that it would have put us back into rent and ramen. And so

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00:18:44.550 --> 00:18:47.780

Leland Gross, CFP® EA: Stephanie was really helpful to say, like segmenting clients.

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00:18:47.990 --> 00:18:54.169

Leland Gross, CFP® EA: And so we have. I have a rock star right hand, who's taking over a lot of those relationships, and

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00:18:54.280 --> 00:18:57.302

Leland Gross, CFP® EA: that's been helpful to just free up capacity.

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00:18:58.750 --> 00:19:07.589

Leland Gross, CFP® EA: I think limitless. One of the biggest things is is the confidence and the clarity like I said I was just throwing things at walls like, Do I need a Twitter community? Do I need

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00:19:07.680 --> 00:19:14.130

Leland Gross, CFP® EA: you know a Youtube channel? What do I need to do? And so getting clear on?

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00:19:14.200 --> 00:19:18.309

Leland Gross, CFP® EA: What are the avenues that bring me life that I like to do, that my

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00:19:18.350 --> 00:19:25.039

Leland Gross, CFP® EA: gifts and skill sets naturally work with and working there and kind of seeing.



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00:19:25.350 --> 00:19:31.356

Leland Gross, CFP® EA: you know. What do I need to be focusing on in my business? What's just playing office

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00:19:32.180 --> 00:19:41.520

Leland Gross, CFP® EA: and kind of having a greater vision. And why has really helped me feel clear on making business decisions and knowing how to draw a line and say.

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00:19:41.580 --> 00:19:46.320

Leland Gross, CFP® EA: I don't need to do that like I can go home today like I can go, be with my family, or

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00:19:46.370 --> 00:19:49.639

Leland Gross, CFP® EA: prioritize the other parts of my life that really matter.

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00:19:51.510 --> 00:19:57.679

Leland Gross, CFP® EA: Some of these other wins the marketing win, you know, creating repeatable processes with referrals and cois.

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00:19:57.870 --> 00:19:58.909

Leland Gross, CFP® EA: I was

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00:19:58.930 --> 00:20:09.334

Leland Gross, CFP® EA: coming from a world that you know, asking for referral was like trying to sell a used car, and was just slimy and terrible, and I didn't have a process for doing it.

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00:20:10.150 --> 00:20:16.069

Leland Gross, CFP® EA: And again, we've implemented. We're still working on really elaborating on this. But we've implemented a basic workflow. For

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00:20:16.080 --> 00:20:19.990

Leland Gross, CFP® EA: you know, when we get a referral. How do we follow up with the person who referred us?

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00:20:20.000 --> 00:20:39.830

Leland Gross, CFP® EA: How do we seed referrals and ask for them? We just did our fall surge, and in every client meeting had kind of a housekeeping update that led to seeding referrals. And we've gotten a lot of referrals from that. And we had 8 new qualifying clients just in the latter half of this year, who are

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00:20:39.990 --> 00:20:48.880

Leland Gross, CFP® EA: ideal clients from referrals just by letting ideal clients know that we want more people like them and doing it in a way that's tactful.



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00:20:48.890 --> 00:20:49.990

Leland Gross, CFP® EA: and

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00:20:50.070 --> 00:20:56.360

Leland Gross, CFP® EA: but also clear and kind of welcoming our clients into the process with us. I think what has been really powerful.

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00:20:58.750 --> 00:21:23.580

Leland Gross, CFP® EA: yeah, this year has been such a such a big year. I'm like looking at these being like, yeah, we honed our value proposition, which then owned our service model and that included bringing on tax prep, which is a huge decision that we had been kind of thinking about and processing through, but deciding what makes sense from a capacity standpoint. We don't need to do more just to do more. We want to focus in on our niche and say, like, What do they want?

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00:21:23.700 --> 00:21:28.220

Leland Gross, CFP® EA: What actually drives value for them? So that was a really big decision for us.

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00:21:28.825 --> 00:21:35.389

Leland Gross, CFP® EA: We've gotten clearer on our value adds, and just kind of creating systems. Again, I'm I'm a systems process.

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00:21:35.410 --> 00:21:44.220

Leland Gross, CFP® EA: What value, adds, do we do? When, how how do we streamline it? How do we make it? Not be the most labor intensive thing in the world, but also

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00:21:44.670 --> 00:21:50.989

Leland Gross, CFP® EA: grab. The. This year was like grab the low hanging fruit that drives a lot of value and and run with that

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00:21:53.030 --> 00:21:56.369

Leland Gross, CFP® EA: And ultimately I feel like the biggest piece that helped me.

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00:21:56.580 --> 00:22:03.020

Leland Gross, CFP® EA: This is such a. It's such a simple tool. But I'm like, why don't we do this all the time? The success shifter. Pdf.

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00:22:03.300 --> 00:22:03.630

Stephanie Bogan: No.

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00:22:03.630 --> 00:22:10.159

Leland Gross, CFP® EA: Just going through that in the my limitless life. Practice and figuring out like.

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00:22:10.300 --> 00:22:18.220



Leland Gross, CFP® EA: I'm not just building a business. I'm trying to build my family, my life, my community, you know everything around me.

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00:22:18.330 --> 00:22:24.920

Leland Gross, CFP® EA: And so what does that? How does that work with business, with my wife, with my kids with my friends

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00:22:25.050 --> 00:22:29.930

Leland Gross, CFP® EA: and going through that daily has helped create true.

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00:22:30.260 --> 00:22:41.560

Leland Gross, CFP® EA: a deeper sense of balance for us. And my family's had a lot going on this year we have a special needs, son. We have a foster son. You know. We were going through lfv like, we just had a lot going on on the home front.

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00:22:41.580 --> 00:22:42.779

Leland Gross, CFP® EA: and so

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00:22:42.860 --> 00:22:50.940

Leland Gross, CFP® EA: part of me was like I could drown in the office and not be home and let my wife get burnt out, and then none of us are living our best life, or

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00:22:50.970 --> 00:23:00.619

Leland Gross, CFP® EA: I could, you know, engage and create some balance, and, you know, still make it to appointments. Still, you know, take vacation, still, get away

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00:23:00.640 --> 00:23:03.879

Leland Gross, CFP® EA: and still grow our income and do that in a way that is

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00:23:04.050 --> 00:23:09.480

Leland Gross, CFP® EA: hyper, efficient and so it hasn't been perfect. There's definitely been

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00:23:09.640 --> 00:23:15.049

Leland Gross, CFP® EA: seasons where it's been sloppy or better, like, Stephanie said. You know I'm not immune to.

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00:23:15.410 --> 00:23:23.469

Leland Gross, CFP® EA: you know, getting into that to the weeds or fighting time or fighting. You know the insecurities. Even right now, I'm like.

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00:23:23.760 --> 00:23:36.589

Leland Gross, CFP® EA: Gosh! Is someone gonna say you only increases revenue by a hundred 1,000. We increase by 300, you know, like, it's easy to get into comparison or insecurity. But for me and the goals that we're setting out to achieve, I feel like it's been a huge



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00:23:37.180 --> 00:23:40.070

Leland Gross, CFP® EA: win for us this year to get our business

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00:23:40.200 --> 00:23:48.609

Leland Gross, CFP® EA: more streamlined. Get clear on what we need to do and start working towards that. And it's been really encouraging pretty quickly to see some

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00:23:48.910 --> 00:23:56.339

Leland Gross, CFP® EA: direct results, you know, like 8 new qualifying clients, increased revenue increased. Average client fee.

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00:23:56.390 --> 00:24:02.209

Leland Gross, CFP® EA: you know, significantly, has been huge, and seeing that you know my wife's not like.

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00:24:03.110 --> 00:24:08.770

Leland Gross, CFP® EA: how long are we going to be in this phase, you know, like I feel like she's beginning to see the payoff as well, which is super helpful.

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00:24:09.140 --> 00:24:12.989

Stephanie Bogan: Yeah, the rent and ramen phase is really fun. Those are.

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00:24:13.540 --> 00:24:21.140

Stephanie Bogan: These are just such great shares. The thing that I really like and appreciate about your story, and I was just making little notes is

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00:24:21.432 --> 00:24:43.980

Stephanie Bogan: one that all at once feeling is really common. Right every year we iterate on the Summit action plans last year right to say from this summit, what are you gonna work on this year? The roadmap, right? We're gonna each of you will personalize that in January, so there is no question about what you should be working on next. But if there is, you know that you can call us no no longer a question.

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00:24:45.190 --> 00:25:10.049

Stephanie Bogan: you will hear. If you go back and watch the success stories or read emails, you will hear time and time and time again. People say, Adam, you've said it a thousand times like your eyes as soon as you go. Turn on the light. Look at what's possible. It's like you're at this giant buffet, and you're hungry, and you're trying to fix 5 or 10 or 15 years in, you know, like 90 days. And I'm like, Hey, we're good. We're really good.

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00:25:10.050 --> 00:25:10.910

Stephanie Bogan: We're not

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00:25:10.910 --> 00:25:19.749

Stephanie Bogan: not that good, right? Because you ultimately have to download, digest, and right absorb and implement what you're learning right, which is why

196

00:25:20.240 --> 00:25:30.930

Stephanie Bogan: those quarterly chunks and and I know it seems overwhelming to your brain. You could pick any project, no joke and work on it, and you'd be better off.

197

00:25:31.050 --> 00:25:44.569

Stephanie Bogan: even if it were like out of sequence for your personal, perfect timeline. What I think Isaiah and Adam and Leland and Jen will tell, like sometimes it's just like I'm gonna pick something. I'm gonna do it. And then you go. Oh, that worked.

198

00:25:44.740 --> 00:25:45.500

Stephanie Bogan: Yeah. And what

199

00:25:45.500 --> 00:25:56.350

Stephanie Bogan: you heard Leland talk about was there was nothing magical or genius in his formula. It was literally what we teach you. Show up.

200

00:25:56.400 --> 00:26:20.500

Stephanie Bogan: Don't worry about all the sexy stuff. Pick one or 2 things focus and get really brilliant at the basics. Hey? How about we put a service model in place and do model meetings, and some value adds, and every time Brian and Jed, who you heard? I think it was last call or earlier right their stories same thing. They got to that 1 million dollar mark without ever having to go out and do the other stuff

201

00:26:20.780 --> 00:26:34.916

Stephanie Bogan: because adding value to your clients, optimizing your time and capacity, making sure you're charging the right fees, turns out that those are things that all right incrementally add up to a really significant shift.

202

00:26:35.540 --> 00:26:42.529

Stephanie Bogan: The other thing that you said that I really liked was you just had this version of just do it like I just had to do something and go

203

00:26:42.835 --> 00:26:50.210

Stephanie Bogan: and then you talked about roadrunner. So all of you should really remember. And you have the. I think it's December 13th or the 16th

204

00:26:50.877 --> 00:26:59.059

Stephanie Bogan: there are examples of everything in the library, right service models, anything I was looking the other day. There's like 8 different examples, ours, Adams.

205

00:26:59.420 --> 00:27:21.759

Stephanie Bogan: past alumni coaches, so that that road runner is. You're never creating things on your



own. So as you're sitting in your office, and you're thinking about the next couple of weeks, 3 weeks. Do not do the it's over now. I'll just close out the year and start fresh like, really, think about what is one thing, not 50 things. You're not going to cover that ground in 2 weeks.

206

00:27:21.760 --> 00:27:37.109

Stephanie Bogan: What is one thing you can focus on between now and year, and that's gonna move the needle if you're joining us next year. That is not an excuse to not get really clear, and if you're not joining us next year, you should definitely do it because you want to maximize the time that you have here.

207

00:27:37.372 --> 00:28:00.189

Stephanie Bogan: The thing I really liked. And, Adam, I said this to you, I think in Denver when we got together was the thing that to me is so powerful about the change that I see in all of you, because I get to see like the nitty gritty. Right? The 1st phone call, like, Oh, yeah, you know, like, I get to see all of that. And you guys see the other side. You're like, oh, if I were Isaiah, or if I were Leland, or if I were Adam, if I were Jim.

208

00:28:00.190 --> 00:28:18.582

Stephanie Bogan: and with all love, all I ever want to say is, Whoa! Whoa! Whoa! They were you like? At 1 point they were as tired, as frustrated, as overwhelmed. The difference is, they took that next best step in this case joining limitless, and then right picking one thing, and then the next thing, and the next thing.

209

00:28:19.080 --> 00:28:33.460

Stephanie Bogan: the thing that I think is so remarkable about all of you, and you'll all say it in your own way. But you'll never say it in this way. Is that you fundamentally sound and act differently when it comes to changing things in your practice.

210

00:28:33.560 --> 00:28:43.390

Stephanie Bogan: It's not like, Oh, I don't know. Like Adam just is like, Hey, I'm gonna do this. I'm working through this. I have this idea, hey? That didn't work out the way that I wanted. I'm gonna change that idea

211

00:28:43.400 --> 00:29:03.730

Stephanie Bogan: there's not like. There's just like he is executing on the vision. He's making tweaks and adjustments right? And he's just continuing to hone that into right, his next level. Best practice the same way that Leland, Isaiah and Jim are so. Leland one. It's just been super cool, like, you guys. This is year one for Leland.

212

00:29:04.500 --> 00:29:15.769

Stephanie Bogan: very similar to Adam. You can do radical things. I tell people all the time. I know, because I've experienced it personally and professionally. Your life can be unrecognizably better in 12 months.

213

00:29:16.280 --> 00:29:29.159

Stephanie Bogan: And so this is an opportunity to really think about how you use this year. What were some of the break break barriers that got in your way right as you are working towards your breakthrough. And then how do you make sure that you account for those next year.



214

00:29:29.240 --> 00:29:39.880

Stephanie Bogan: Leland. I just wanted to ask when when it came to implementing, how did like to your point around the success shift? Or is that what helped you kind of get that the flywheel going likes to talk about it.

215

00:29:40.590 --> 00:29:46.369

Leland Gross, CFP® EA: There's I. I feel like limitless was so helpful this year. And so even as you're talking, I was like

216

00:29:46.520 --> 00:30:03.250

Leland Gross, CFP® EA: you had mentioned earlier in this call, hey? Reach out if you need help, like. I remember just posting in tribe like I'm lost. Is anybody else lost here? And Stephanie hopped on a 30 min call with me, and it

217

00:30:03.570 --> 00:30:11.050

Leland Gross, CFP® EA: gave me so much clear she was like, this is what you're gonna do. Send me what you're doing. And she sent back an email that's basically been almost like my new

218

00:30:11.070 --> 00:30:14.859

Leland Gross, CFP® EA: roadmap. A little bit like it's helped me hone down.

219

00:30:14.900 --> 00:30:17.989

Leland Gross, CFP® EA: Okay, someone has looked at my practice. That's not me

220

00:30:18.000 --> 00:30:21.439

Leland Gross, CFP® EA: knows what I'm doing, knows what I've built and what I'm trying to build.

221

00:30:21.460 --> 00:30:26.640

Leland Gross, CFP® EA: And it said, Here's the few things to execute on, and so that

222

00:30:26.700 --> 00:30:33.710

Leland Gross, CFP® EA: I've had success shifters been helpful to balance work and life, and make sure and hold me accountable to certain things like

223

00:30:33.770 --> 00:30:39.662

Leland Gross, CFP® EA: the tedious like. How many times am I doing this? That or the other in in a month or in a week?

224

00:30:40.200 --> 00:30:46.079

Leland Gross, CFP® EA: But it's been kind of a a team effort between. Like I'm in a mastermind with another limitless

225



00:30:46.730 --> 00:31:00.350

Leland Gross, CFP® EA: advisor who's been helpful to check in on having a coaching call with Stephanie, and then the success shifters kind of the more practical day in and day out, like, you know, hey? I

226

00:31:00.530 --> 00:31:07.699

Leland Gross, CFP® EA: haven't gone home early once this week, but that's on my success shifter. So we gotta make that happen. I also think

227

00:31:08.230 --> 00:31:16.609

Leland Gross, CFP® EA: so. Those would be like the more practical like. Those were the few things I really saw tangible change, but the mindset shift has been

228

00:31:17.150 --> 00:31:23.339

Leland Gross, CFP® EA: just as practical, if not more powerful. I remember at the 1st summit call or the launch call for the year.

229

00:31:23.600 --> 00:31:27.879

Leland Gross, CFP® EA: just talking about like, get comfortable, being uncomfortable and

230

00:31:27.890 --> 00:31:29.860

Leland Gross, CFP® EA: saying like these things are scary.

231

00:31:29.860 --> 00:31:30.960

Stephanie Bogan: A year. Yeah.

232

00:31:30.960 --> 00:31:35.490

Leland Gross, CFP® EA: Yeah, like increasing. Your fees are scary. Having that conversation with clients is scary.

233

00:31:35.630 --> 00:31:40.930

Leland Gross, CFP® EA: you know. Putting your niche on your website. Feel scary. You know all these things where you're like?

234

00:31:41.230 --> 00:31:46.290

Leland Gross, CFP® EA: Your gut sort of tightens up a little bit, and you're like, Oh, am I really doing this well?

235

00:31:46.820 --> 00:31:48.910

Leland Gross, CFP® EA: And then you do it, and it's

236

00:31:49.030 --> 00:31:56.009

Leland Gross, CFP® EA: natural. And you know we didn't have a single client bucket. Our fee increases. Some increases were over double their fee.



237

00:31:56.080 --> 00:31:59.269

Leland Gross, CFP® EA: and we didn't have anybody bucket the, you know

238

00:31:59.280 --> 00:32:04.759

Leland Gross, CFP® EA: niche on the website. But all that did was increase our SEO. So it's like, you know.

239

00:32:04.820 --> 00:32:14.929

Leland Gross, CFP® EA: I think, realizing like you, said Stephanie, making change originally feels really scary, but once you get comfortable with it, then you're just like, well, this is what we're gonna do.

240

00:32:15.020 --> 00:32:19.699

Leland Gross, CFP® EA: We're running towards a goal that's bigger than just having a people pleaser practice.

241

00:32:19.710 --> 00:32:25.392

Leland Gross, CFP® EA: but into like a practice that really drives change, and sometimes that takes doing uncomfortable things. And so we're just gonna do it.

242

00:32:26.320 --> 00:32:49.129

Stephanie Bogan: Well, I just did. You guys just hear like it's so practical his commitment. But but again, on the front end of that, Isaiah had them. Jen had them. Adam certainly. Did. I call them white knuckle moments where you're like? They're telling me this is okay. My brain says it's okay. But that little caveman in the back of my brain is like, - don't do it. This is gonna go so badly

243

00:32:49.439 --> 00:33:07.680

Stephanie Bogan: and I gotta tell you I say this every time knock, knock, knock on all the wood. I've been doing this 30 years. I have not in 30 years had one person call me and say, that was awful literally every time those white knuckle moments are followed by some version of Wow! Why didn't they do that sooner?

244

00:33:07.990 --> 00:33:32.960

Stephanie Bogan: And when it's fee raises and transitions. And you're like, Oh, it's gonna be terrifying. Ask Leland like, after the 3rd or 4, th you're like, let's do this. And you're like, let's go to that next segment. Actually, nobody had any issues that whatsoever like, I have people literally call me up. And they're like, Oh, my God, I'm gonna just I'm gonna just rush like I thought this was, gonna be this long drawn out thing they do that 1st tranche of of the terrifying transition.

245

00:33:32.960 --> 00:33:39.219

Stephanie Bogan: as we call them, right fees, services, or advisors are changing. Those are the 3 terrifying transitions.

246

00:33:39.220 --> 00:33:47.140

Stephanie Bogan: They are also the most valuable things you can do to optimize time, capacity, and



margins. There's a great quote that I love.

247

00:33:47.380 --> 00:33:59.480

Stephanie Bogan: Have it on my wall over there, and it says, Write this one down because this is my, my, I'm gonna call this the lead, Lynn. Challenge. What is the thing or the change that you were most afraid of making, that you haven't made yet?

248

00:34:00.410 --> 00:34:00.940

Leland Gross, CFP® EA: Hmm.

249

00:34:00.940 --> 00:34:03.100

Stephanie Bogan: Make that change.

250

00:34:03.520 --> 00:34:09.200

Stephanie Bogan: The cave you fear to enter is where all your treasure lies.

251

00:34:10.940 --> 00:34:36.620

Stephanie Bogan: You have to demonstrate that you want it, that you're willing to show up. Be uncomfortable. Know your worth, charge your fees. Make sure you feel confident about the value you're delivering. If you don't go fix that. Then go do it like it is really like A plus B equals. C. Truly, it's why it works over and over again. The only thing that doesn't work is the resistance that we face, and that's what you're all

252

00:34:36.780 --> 00:34:51.429

Stephanie Bogan: in some form or fashion trying to overcome right? What's happening in your head? What's happening in your schedule, the hesitation around decisions that oh, I don't know the pausing and the procrastination. I'll get to that later. Are all strategies

253

00:34:51.480 --> 00:35:20.029

Stephanie Bogan: that your brain uses to slow, you install you so that you stay squarely rooted in the status quo to Leland's point is, you should now know your job is to insert yourself in the 5% of your conscious thinking to say, my name is Isaiah, and this is what I'm going to do with my practice this year, right? And here is the next thing I'm going to do. And then, as Isaiah will share, like you make the next change in the next. And that's how that fly Will. It gets going if you're on the treadmill.

254

00:35:20.030 --> 00:35:43.640

Stephanie Bogan: and you never pause to get off. You can't get on the flywheel right. They are not the same thing. One is energy and momentum are working for you, and you feel like I've got agency. I can make a change. I'll figure it out. I can call someone which is very different than sitting back and going. I just I don't know I can't. I shouldn't. I don't know how it's going to be terrifying. I don't know if I should call anyone. I don't know what's next.

255

00:35:43.870 --> 00:35:45.669

Stephanie Bogan: Those are all

256



00:35:46.180 --> 00:35:56.280

Stephanie Bogan: shrinking strategies that your brain uses literally to give you that case of the small. So we sit back and we shrink ourselves from what's possible in terms of what's next.

257

00:35:56.800 --> 00:36:04.639

Stephanie Bogan: So Leland, I think is a fabulous example, as Adam was in that 1st year. Like, if you come in and you get really clear.

258

00:36:04.930 --> 00:36:33.960

Stephanie Bogan: not hey? What's the plan of everything like Leland got clear on the few things he was gonna work on, and then he raised his hand, and then he got a roadmap that was like, go do all these things. And that's how the system really should work. Right? You get what you need, you reference, the resources you raise your hand, we get you over that hurdle or hold you accountable if that's what you need. Flywheel starts turning faster right? And then you get that energy and momentum, and like Adam and Leland and Isaac like you go. Oh, this is what I'm going to do. This quarter

259

00:36:34.070 --> 00:36:53.340

Stephanie Bogan: doesn't mean you don't get busy. Doesn't mean you don't get distracted, but it means that you know there are levers on the wall that you can go. Choose to pull at any time to make things different and better, and the second, that you get clear that you have that kind of agency in your practice, whether it's with limitless or anyone else, I don't care.

260

00:36:53.480 --> 00:37:14.249

Stephanie Bogan: That's the magic potion. That's the Mojo. The second that Ian goes. Actually, I will figure this out, or I'll find a way, or I'll make one, or I'll ask someone. But I know this is right. I need to create this change. These are the steps I'm taking. It is in that effort of energy expenditure, that all the change happens. And that's effort

261

00:37:14.250 --> 00:37:25.419

Stephanie Bogan: is what we have to do to insert ourselves between us and that resistance, which is why things like the success shifter are so valuable because it's essentially a personal awareness

262

00:37:25.440 --> 00:37:35.609

Stephanie Bogan: and accountability system. This is Julie. These are the things that are going to help you. Let's focus on doing more of those. These are the things that are holding us back. Let's focus on not doing those.

263

00:37:35.700 --> 00:37:58.390

Stephanie Bogan: And you're literally with that tool, rewiring your brain with your personal operating system, your thought, habits, and your behavior habits determine your business habits and your success. So, starting with you, I think, to Leland's point is the most important thing that you can do, because, knowing how to use your time and what to focus on is the momentum that creates everything else that makes it possible.

264

00:37:59.310 --> 00:38:08.369

Stephanie Bogan: Leland, it's been a pleasure. I I still have. Leland sent me a video. It was very cute. He like. It was like what 15 or so 20 min he sends me this video of like



265

00:38:08.800 --> 00:38:31.949

Stephanie Bogan: whole marketing thing. You guys great video. He has the whiteboard. He like maps. The whole he like took my roadmap, and he like built the whole thing. And he's like I did this, and I did this, and I built this funnel. And I did this. And I he's like, what feedback do you have? I was like, that's great. Go do that like literally. I mean, I think I had some context in there. But the gist of my email was like dude. You just crushed it.

266

00:38:32.640 --> 00:38:43.999

Stephanie Bogan: You took what I gave you and like you did it all. And you're implementing and with marketing, which is again getting that pipeline going, you have to start the engine to get it purring.

267

00:38:44.300 --> 00:39:03.090

Stephanie Bogan: and we are so hesitant we are gonna really kick your butt next year in q, 1 on that. If you are around next year get ready for a much higher degree of accountability. Like, we need to be looking at like, what are we doing to grow net new and assets, pipeline. Not not just the big stuff, but like, what's your daily plan to make that happen?

268

00:39:03.370 --> 00:39:13.579

Stephanie Bogan: So, Leland? Congratulations on a fantastic year you drank from the cup with both hands, and it shows, and I'm just we could not be more honored and happy to see the kind of results that you got. Man.

269

00:39:14.180 --> 00:39:15.849

Leland Gross, CFP® EA: Thank you. I appreciate it.

270

00:39:15.850 --> 00:39:18.720

Stephanie Bogan: Woo! Woo! Where's my little weight? I have these.

271

00:39:19.370 --> 00:39:23.299

Stephanie Bogan: You guys see the new emojis? Oh, see, they disappear! I can never tell.

272

00:39:25.280 --> 00:39:28.690

Stephanie Bogan: I'll have to find the emojis. Someone has the emojis. You can do them.

273

00:39:29.110 --> 00:39:30.540

Bridget Borel: Under react.

274

00:39:31.120 --> 00:39:31.739

Stephanie Bogan: React, hold on.

275

00:39:31.740 --> 00:39:33.510

Bridget Borel: The little heart symbol.



276

00:39:33.770 --> 00:39:40.320

Stephanie Bogan: I know it's normally up on my thing, but now I've got 9 things open, so it truncates it. Alright, Leland, we're sending you hearts.

277

00:39:40.890 --> 00:39:42.692

Stephanie Bogan: Oh, there we go! Thank you, guys.

278

00:39:43.290 --> 00:39:53.230

Stephanie Bogan: Alright. If you guys have any questions for Leland feel free to dry. Didn't see any in the chat while we were covering. Did anyone have any questions for Leland before we go to Isaiah?

279

00:39:57.710 --> 00:40:00.760

Stephanie Bogan: Quiet contemplation! I like it all right.

280

00:40:01.170 --> 00:40:05.670

Stephanie Bogan: Oh, I actually think Jim is next. Let's see who's next, Mr. Nowak. You there.

281

00:40:08.620 --> 00:40:16.280

Jim Nowak, CFP®, AIF®, AAMS®: Yes, I'm here. I was about to just send a a little chat to tell Leland, like, Yeah, I mean, took all my thunder. It's great.

282

00:40:16.680 --> 00:40:17.480

Stephanie Bogan: I mean.

283

00:40:17.480 --> 00:40:19.854

Jim Nowak, CFP®, AIF®, AAMS®: 2 min. It's it's awesome.

284

00:40:22.220 --> 00:40:31.229

Jim Nowak, CFP®, AIF®, AAMS®: yeah, alright. So you want me to give me the overview here. I'll just tell you I'm here to give, but every time you give you get tenfold back already, I've got

285

00:40:31.370 --> 00:40:51.233

Jim Nowak, CFP®, AIF®, AAMS®: 10 or 15 things I wrote down from Leland. So if you're not writing stuff down or grabbing some from here. You're missing out. So I've had a lot. This is my 3rd year through limitless right? There's that 3rd year that. Oh, I should have done it all well, even if I did. 10% of what I achieved we still exceeded all expectations.

286

00:40:51.760 --> 00:40:59.630

Jim Nowak, CFP®, AIF®, AAMS®: you know. I'll just tell you the issues that I faced. I got 4 issues. That I faced coming into this one was, I can't say no.

287

00:40:59.740 --> 00:41:14.820

Jim Nowak, CFP®, AIF®, AAMS®: and Stephanie's learned I've had I've learned how to say no, I even

use that example to. I think my wife and my kids the other day. There, they don't want to say no to anything, and I'm like, Well, if we say yes to everything, we're saying No to something else. We just don't know what it is

288

00:41:14.850 --> 00:41:23.230

Jim Nowak, CFP®, AIF®, AAMS®: second, I want to do everything perfect. So I just learned rip off and deploy. Oh, man, I stole that idea, and and I use that tremendously

289

00:41:23.270 --> 00:41:29.794

Jim Nowak, CFP®, AIF®, AAMS®: focus time, distraction. Oh, I am, add Central, like times 10. Just so everybody knows

290

00:41:30.480 --> 00:41:49.810

Jim Nowak, CFP®, AIF®, AAMS®: But the idea is to figure out one thing, and then Leland said, he's self paced, and I said, I am absolutely not. I'm the opposite. So, Leland, when you self pace yourself, I just said I'm going all in on this one thing in the next 2 weeks, and I'm going to finish it, and then maybe I'll be undistracted enough to do something else next month.

291

00:41:49.860 --> 00:41:53.390

Jim Nowak, CFP®, AIF®, AAMS®: So I think you still have Isaiah. Stephanie. You might want to put mine stuff.

292

00:41:53.390 --> 00:41:53.980

Stephanie Bogan: Oh, I'm sorry!

293

00:41:53.980 --> 00:41:57.479

Adam Cmejla, CFP®: Yeah, Steph, I think you. I think you click forward a slide. There we go.

294

00:41:57.480 --> 00:41:57.859

Stephanie Bogan: There you go!

295

00:41:57.860 --> 00:42:05.019

Jim Nowak, CFP®, AIF®, AAMS®: There you go. Okay, so I'll go through each, and then I've got a couple of other things to go through. So my client when you know we came in. We're just.

296

00:42:05.090 --> 00:42:21.580

Jim Nowak, CFP®, AIF®, AAMS®: We've we've done the limitless lifestyle. We're kind of maybe teetering into the scale. Or actually, I'm totally into that scale now. So again, if the assets are different than what your goals are, don't worry about that. Everybody has different solutions that we're trying to solve, for I think next year.

297

00:42:21.640 --> 00:42:41.679

Jim Nowak, CFP®, AIF®, AAMS®: next year my big solve is time balance more with, I shouldn't say balance, which is more with the family. I need to get back to exercising and other things. So we just want to sustain where we're at. But yeah, year to date, we're up 16 new clients. We're up 26 million new assets



as of October 31, st I think we brought in 3 more.

298

00:42:41.700 --> 00:42:48.900

Jim Nowak, CFP®, AIF®, AAMS®: So I think we're gonna hit 30 million of new assets hopefully, 25 to 27 nets this year. That's really cool.

299

00:42:49.530 --> 00:42:57.130

Jim Nowak, CFP®, AIF®, AAMS®: More important than that is how that's, I think, a lagging indicator. The leading indicator was the mindset win. So

300

00:42:57.970 --> 00:43:18.750

Jim Nowak, CFP®, AIF®, AAMS®: I'm just going to go into. If you're not using these summits and going to the conferences, I think you're going to get a lot out of limitless regardless if you're self-paced like Leland. But for me I need to go there. I need to see Stephanie. I need to see the coaches. I need to ask Adam 10 things every time I see him, because he's doing so many things right. And if I could get one idea. So

301

00:43:18.880 --> 00:43:22.969

Jim Nowak, CFP®, AIF®, AAMS®: we had a dinner. I wanted dinner with the coaches one night, and they

302

00:43:23.000 --> 00:43:26.549

Jim Nowak, CFP®, AIF®, AAMS®: like just burned me. I felt like I was just roasted

303

00:43:27.580 --> 00:43:55.390

Jim Nowak, CFP®, AIF®, AAMS®: about why I should set my minimums to a million. I realized for me I have a lot of pre retirees that are going to retire with a million. But if I could bring in, you know, 3, \$400,000 those couple years, I'll get the big rollovers. So we set the minimum up to 6 k. Minimum, and that wound up being one and a half for 401 and a quarter for 500. Most of our clients are at about 1% a year because they're over a million. But that was huge for me. That was the biggest mindset shift.

304

00:43:55.784 --> 00:44:13.119

Jim Nowak, CFP®, AIF®, AAMS®: Because I'm a people pleaser again. Going back to Leland. I just want to say yes to everybody. But again I said yes to them that means I said no to all the high net worth clients that I'm more suited to serve going forward. And I think that is really what helped us. The last call I had with Stephanie

305

00:44:13.280 --> 00:44:15.750

Jim Nowak, CFP®, AIF®, AAMS®: again. That coach access was

306

00:44:15.850 --> 00:44:27.539

Jim Nowak, CFP®, AIF®, AAMS®: Jim. You you gotta get rid of some people. You got to right size them, or you need staff to help you and I was. I have the new guy in the other room, Gabe. He's been here about a month.

307



00:44:27.590 --> 00:44:40.830

Jim Nowak, CFP®, AIF®, AAMS®: and it was hard for me to have another hire, because I wasn't sure if I'm ready to get somebody else to be a servicing advisor, and he's brand new. He's probably going to be working with clients in about a year, but that was huge for my firm. And to know I just got to get them

308

00:44:41.030 --> 00:44:46.602

Jim Nowak, CFP®, AIF®, AAMS®: to that next level, quicker, faster is anybody else. If anyone is on this

309

00:44:47.090 --> 00:44:59.350

Jim Nowak, CFP®, AIF®, AAMS®: maybe considering about their right hand, you know, if you're on the fence again. Talk to Stephanie, of course, but my answer would be, if if you don't have a right hand, you're doing all their work, and I would tell you, get the

310

00:44:59.610 --> 00:45:06.059

Jim Nowak, CFP®, AIF®, AAMS®: the best right hand which I have now, and I've had it for a couple of years. It makes all the difference in the world.

311

00:45:06.220 --> 00:45:10.230

Jim Nowak, CFP®, AIF®, AAMS®: and I'm going to tell you that's how you're going to scale your time or your your growth.

312

00:45:10.780 --> 00:45:29.089

Jim Nowak, CFP®, AIF®, AAMS®: All right. Marketing win this one. I didn't know what to do. I do a lot with marketing. I have a marketing calendar for 2025, built out from mailers to newsletters, to webinars, to lunch and learns to retirement classes to everything. I mean it's built out. But again I have somebody helping me with that.

313

00:45:29.090 --> 00:45:41.829

Jim Nowak, CFP®, AIF®, AAMS®: But I used to do it myself, and hey, if I if I added 7 things, and I got to 4 every month. It really was what helped build me here. The next initiative, again going back to the summer, met Greg. What's his name?

314

00:45:42.940 --> 00:45:43.539

Adam Cmejla, CFP®: We all know.

315

00:45:43.540 --> 00:45:44.290

Stephanie Bogan: Oh, we'll know. Yeah.

316

00:45:44.290 --> 00:45:44.750

Jim Nowak, CFP®, AIF®, AAMS®: Will. Now.

317

00:45:45.100 --> 00:46:05.890

Jim Nowak, CFP®, AIF®, AAMS®: okay, yeah, we're debating about hiring him, because I just learned about the lead magnets that he set up for Adam and all that, and our website is good. My wife is not happy with it. She wants it to be amazing. So that's probably our next initiative into next year. But the



other one was, and I kind of put this under value was, I used a lot of video not nearly as much as I had hoped.

318

00:46:05.930 --> 00:46:10.590

Jim Nowak, CFP®, AIF®, AAMS®: but I learned from limitless from folks. Here is like loom.

319

00:46:10.840 --> 00:46:34.119

Jim Nowak, CFP®, AIF®, AAMS®: No, I don't have loom videos for all my processes. That's where Adam's great and I'm not. I like to go out and talk and meet with people, and I like to play chess in my head with financial planning. That's where my strong suit is, but I use loom to engage people to thank prospects to get them prepped for the next meeting. That was huge for me. If you're not using video, I think we're missing out, and you could use it so simply.

320

00:46:34.395 --> 00:46:56.449

Jim Nowak, CFP®, AIF®, AAMS®: That was one thing it really took. I can't tell you how many times I had a new client said yes, and I sent them a loom the next day about all the next steps, and I got responses like God. Your organization is so organized and it's so set up. I'm like, man. It was a 2 min video, but it changed the impression. And I think we have a good onboarding, but I think it changed the impression to them.

321

00:46:56.560 --> 00:47:17.279

Jim Nowak, CFP®, AIF®, AAMS®: Value wins. Oh, my gosh, all right, here you go. I implemented surge 100% all in 6 weeks. My team is scrambling every time we do it, but it's getting better now. We're down to 5 weeks. I also implemented a surge for my retirement classes. So when I teach classes, I'm usually getting 20 to 30

322

00:47:17.400 --> 00:47:32.589

Jim Nowak, CFP®, AIF®, AAMS®: folks come in and see me, and we kind of have a search for those video. I already talked about delegating the email. Mostly, I'm still a control freak. But wow, that has helped. Because now the emails need to go to my other team members. They go there and I don't have to touch them

323

00:47:32.930 --> 00:47:52.440

Jim Nowak, CFP®, AIF®, AAMS®: tech stack limitless. You guys are all tech geniuses. I'm kinda I guess I'm at that point where I feel like I'm the old guy in the room, and I probably am now. But I am like old. I'm the late adopter. I'm slow, but I've used a lot of technology, precise Fp Fp. Pathfinder. I'm all the stuff I've learned from limitless groups and folks.

324

00:47:54.210 --> 00:47:56.410

Jim Nowak, CFP®, AIF®, AAMS®: What else the fit call

325

00:47:56.620 --> 00:48:10.319

Jim Nowak, CFP®, AIF®, AAMS®: wow the fit call, you know. I do get a lot of inflow of traffic, and I used to give everybody an hour because I want to help everybody. But I realized, Hey, a 15 min call, and if somebody has \$200,000 and they're not going to retire. Soon

326



00:48:10.320 --> 00:48:30.880

Jim Nowak, CFP®, AIF®, AAMS®: I got a list of other advisors. I get them to where they need to be. I save my time. I save my staff's time, and I protect the time from my existing clients so like. If you haven't gone through the prospect process, what is it called perfecting the prospect process? Go through that. Read it. Take 80% of what they have, just throw it on the wall, start implementing it and refine it the second time.

327

00:48:31.340 --> 00:48:33.770

Jim Nowak, CFP®, AIF®, AAMS®: I'm taking too much time, limitless. Win.

328

00:48:33.770 --> 00:48:34.690

Stephanie Bogan: No, you're great.

329

00:48:34.690 --> 00:48:37.509

Jim Nowak, CFP®, AIF®, AAMS®: All right, limitless win. Here's where I won.

330

00:48:37.790 --> 00:48:49.280

Jim Nowak, CFP®, AIF®, AAMS®: The 1st time I went out to see Stephanie and those folks. I think it was February, somewhere in the I think it was out in a ski lodge somewhere, really cool place, and they said, What was your dream? And I said, I want to take a month off.

331

00:48:49.510 --> 00:49:05.920

Jim Nowak, CFP®, AIF®, AAMS®: And Stephanie, I remember chatting with me was like, Well, why isn't it on there schedule? It just do it. I was like, because because because you know, should should all be yourself. Right is what they said. So I just scheduled it. I said, honey, we're going to go to Maine for a month.

332

00:49:05.950 --> 00:49:29.229

Jim Nowak, CFP®, AIF®, AAMS®: and she said, when I said, When the kids get out of school and we just planned it, and we did it, and it was awesome. The year after I took Ireland. We did 3 weeks. Last year we did an Rv. Trip with another family for 2 weeks. Yes. Do you hear the trend? A month, 3 weeks, 2 weeks. I have teenagers. They're like they want to be at home. But we did 3 weeks away, including New York, and next year it's Italy and Greece. So that was my huge win.

333

00:49:29.450 --> 00:49:41.849

Jim Nowak, CFP®, AIF®, AAMS®: unbelievable Stephanie, can I take one more minute to run through things? Okay, hey, guys, I I wrote down after this is, here are the tools that I think you need to look at before the end of the year.

334

00:49:41.860 --> 00:49:46.120

Jim Nowak, CFP®, AIF®, AAMS®: Number one. You need a 1 page business plan that's in the tribe.

335

00:49:46.170 --> 00:49:54.170

Jim Nowak, CFP®, AIF®, AAMS®: That is my game plan for next year every year, and I'm doing it. On the 17.th This year I have a time block.



336

00:49:54.390 --> 00:50:01.619

Jim Nowak, CFP®, AIF®, AAMS®: We talked about the annual calendar for me. I bought. We have our surge meetings blocked out entirely for next year already.

337

00:50:01.700 --> 00:50:04.820

Jim Nowak, CFP®, AIF®, AAMS®: and if you don't have a calendar, nothing's gonna get fit in.

338

00:50:04.870 --> 00:50:13.319

Jim Nowak, CFP®, AIF®, AAMS®: I have all my school time now for all my kids. I got 4 kids. We have our summer trip do that. That's how it got me to where I am today.

339

00:50:14.500 --> 00:50:16.260

Jim Nowak, CFP®, AIF®, AAMS®: The mastermind.

340

00:50:16.580 --> 00:50:40.150

Jim Nowak, CFP®, AIF®, AAMS®: So I'm gonna this is kind of a success, but kind of a failure all combined. You know we had a mastermind, and a lot of the folks kind of dropped out or fizzled out. Maybe they're on this call, but it just didn't work out. So I created my own, and you should go through the mastermind exercise and have one. The reason I'm also like I've I've hit. Probably 60% of my goal is maybe 70 is because I have a mastermind meeting on Wednesday morning for 2 h.

341

00:50:40.380 --> 00:50:50.606

Jim Nowak, CFP®, AIF®, AAMS®: Use that leverage. It use extreme accountability, and everybody in this room is open to it. Right? Talk to somebody that had helped me a ton

342

00:50:51.140 --> 00:50:56.470

Jim Nowak, CFP®, AIF®, AAMS®: and go to the conferences. I I have like 30 other notes, but I think that's good enough. What do you think? Stephanie asked me.

343

00:50:56.470 --> 00:50:57.339

Stephanie Bogan: I love it, I love it.

344

00:50:57.340 --> 00:50:57.760

Jim Nowak, CFP®, AIF®, AAMS®: Yes.

345

00:50:57.760 --> 00:51:00.490

Stephanie Bogan: I was just. I was type. I was grabbing this for people.

346

00:51:00.740 --> 00:51:04.749

Stephanie Bogan: No stress prospect process. There you go. And then.

347

00:51:05.140 --> 00:51:18.820

Jim Nowak, CFP®, AIF®, AAMS®: Success. Shifter starting today. The business vision. Oh, my gosh! The



business vision should be before the one page plan should be before the calendar. Everybody should do that. And I'm gonna land on

348

00:51:19.040 --> 00:51:20.170

Jim Nowak, CFP®, AIF®, AAMS®: B.

349

00:51:20.210 --> 00:51:31.070

Jim Nowak, CFP®, AIF®, AAMS®: Get comfortable, being uncomfortable because Leland stole that from me, too. But I'm always uncomfortable. I live in a world of uncomfortableness, and I just think that's what you got to do. And if you want to be successful.

350

00:51:32.400 --> 00:51:53.430

Stephanie Bogan: Well, I always say, if you're not uncomfortable, then we haven't done our job. The real question is what you do with that discomfort. So it's really interesting. I talk to my kids about this a lot with their 13 and 17 when they were little, I kept thinking they'd get older, and then I could talk to them, and now they still roll their eyeballs at me. That feeling that you get you've all felt it

351

00:51:53.630 --> 00:52:00.519

Stephanie Bogan: where you're going to work on something, and you're staring at a page, or you just don't know. And you have like that. Ugh!

352

00:52:00.600 --> 00:52:02.219

Stephanie Bogan: Feeling in your brain.

353

00:52:02.480 --> 00:52:07.700

Stephanie Bogan: That feeling is literally your brain growing.

354

00:52:08.360 --> 00:52:19.329

Stephanie Bogan: My kids are studying. And they're like, I'm never gonna get this. I'm like that awful feeling in your head right now where you're like, I'm like, that's literally your brain growing. Those neural pathways are stretching for what's new.

355

00:52:19.350 --> 00:52:26.229

Stephanie Bogan: and that discomfort is required because the whole point of limitless is one thing.

356

00:52:26.430 --> 00:52:30.010

Stephanie Bogan: it is to literally disrupt your operating system.

357

00:52:30.070 --> 00:52:46.569

Stephanie Bogan: your personal operating system, and your professional operating system, so that you can create new levels of mastery in both. Personally, clarity, time, focus, discipline, accountability, leadership, key tenants of successful people in any space or profession

358

00:52:46.570 --> 00:53:08.220



Stephanie Bogan: period. If we cannot master our mindset and our thinking right, and then apply the way ourselves, our time, energy, and capital, the way that we want. We are not in charge of our businesses or our lives, and that is why, very often you will feel like you are not running your practice. It's running you. That's the treadmill. We want to get off the treadmill.

359

00:53:08.390 --> 00:53:17.230

Stephanie Bogan: Start turning the flywheel. The treadmill is easy. You show up. You're like frustrated, but you do it again today and tomorrow, and the next day and the next day, and the next day

360

00:53:17.720 --> 00:53:19.830

Stephanie Bogan: the flywheel is pause.

361

00:53:20.310 --> 00:53:41.220

Stephanie Bogan: I'm gonna work on. My success shifter between now and year end. I'm gonna go work on that prospect process between now and Year End. I'm gonna put time on my calendar. I'm gonna sit down. I don't know about you. I get new tech. I love tech and new things right. Adam introduced me to flown, and then, like shows up on my calendar, and I'm like I'll do that later, because my brain is literally like it's new. It's effort. It's energy. Just

362

00:53:41.310 --> 00:54:00.179

Stephanie Bogan: put it off and do the easy routine automatic. Just go check, email, go get distracted like. It's so not effortful to do that like. It's easy to maintain the habits that are not fully serving us. So if you have been uncomfortable this year. That is literally the moment

363

00:54:00.450 --> 00:54:06.880

Stephanie Bogan: where you sit in that space, and consciously or subconsciously decide to move forward with a next step.

364

00:54:06.880 --> 00:54:30.839

Stephanie Bogan: to turn the flywheel, or you don't. So if you've had that pain, frustration, or tension this year, that is your warning signal. Ding, ding, ding! This is something you definitely need to deal with in the next 30 days like that's my invitation to you. Whatever creates that feeling or frustration or uncertainty is very likely one of the big levers that you need to pull.

365

00:54:30.840 --> 00:54:34.090

Stephanie Bogan: And as Jim's gone through and others

366

00:54:34.210 --> 00:54:47.500

Stephanie Bogan: right, there's a lot of resistance that happens up here along the way. But when you make that commitment, as you are, hopefully seeing when you make the commitment to make the changes, the changes actually show up with a better practice.

367

00:54:48.260 --> 00:55:06.560

Stephanie Bogan: So, Jim, you've been what this is your 3rd year and it really just goes to show like, if you went back to your 1st year it. I'm sure that flywheel was turning. I don't know how it compares to year 3 like, what? What was your experience? Did it build over time? Did you kind of stall out and really



get your legs in year 2 and 3 like, what was your experience?

368

00:55:06.990 --> 00:55:12.530

Jim Nowak, CFP®, AIF®, AAMS®: Oh, man, you know. So I've gone through. I've always had a coach right? I've gone through different programs.

369

00:55:12.860 --> 00:55:35.320

Jim Nowak, CFP®, AIF®, AAMS®: And I think I kind of know a lot, and I've implemented quite a bit, too. But, Stephanie, I came in here, and if anybody's new to coaching, and they come to limitless and think they're overwhelmed. Don't worry. I've been through many programs, and I was still overwhelmed. I was like holy crap all the stuff that they have here like she's not giving me one way. She's giving me 5 ways. Which for an add person that's the worst. But good.

370

00:55:35.693 --> 00:55:37.880

Jim Nowak, CFP®, AIF®, AAMS®: Yeah, I think it was a matter of.

371

00:55:38.050 --> 00:55:47.050

Jim Nowak, CFP®, AIF®, AAMS®: you know, the 1st year you didn't have that roadmap. The whole roadmap really helped, you know, prior to that, I feel like we were just thrown out to the Wild West with everything.

372

00:55:47.240 --> 00:56:04.710

Jim Nowak, CFP®, AIF®, AAMS®: but I feel like I just went down. Whatever my pain points were, the diagnostic same thing. I got a couple of reds, and I said, All right, let's work on a prospect process. Let's work on this fit call. Last year, was the onboarding. I mean, I'm going to tell you. I think the onboarding was one of the biggest definers of

373

00:56:04.940 --> 00:56:12.879

Jim Nowak, CFP®, AIF®, AAMS®: how our new clients perceive us versus the prior ones, because we have refined it. And with that I have

374

00:56:13.480 --> 00:56:21.300

Jim Nowak, CFP®, AIF®, AAMS®: delegated the onboarding to other team members. Actually, I even I've delegated to my power planner like he's been running the meeting. So

375

00:56:21.340 --> 00:56:24.260

Jim Nowak, CFP®, AIF®, AAMS®: gosh! What was the flywheel versus today?

376

00:56:24.810 --> 00:56:44.069

Jim Nowak, CFP®, AIF®, AAMS®: You know, I think I hit maybe 3 or 4 big wins every year. I think that's what it is. And if anybody's used Eos or something, I write a big rock, and I had, you know, for the year. That's your business vision. That's 1 page plan. I had like 3 or 4 things, and I might have missed a lot of little ones, but I hit the big ones every year, and I committed to that.

377

00:56:44.760 --> 00:56:45.450

Jim Nowak, CFP®, AIF®, AAMS®: That was huge.

378

00:56:45.450 --> 00:57:04.479

Stephanie Bogan: If you pick one big project a quarter, which is how this is right, you can do more for sure, and some of them go together like right sizing really, naturally leads into service model right? Once you've right size, you know who you want to have and who you want to grow with. So you know what kind of service model to create? Right? So it gets a lot easier if you do it in sequence. But

379

00:57:04.480 --> 00:57:24.179

Stephanie Bogan: yeah, those changes really. Do we talk so much here about how consistency compounds if you listen to Adam over 5 or what 6 years now, right? It wasn't like, oh, this massive change! And then nothing. It was Bill Bill, you know, kind of what I think. It was like 9 or 10 months he did that first, st Adam. Remember you did that 1st big journal post.

380

00:57:24.800 --> 00:57:32.689

Stephanie Bogan: You're like processing, and that was kind of the dam breaking for you like literally. You might be in a place where you've implemented some stuff.

381

00:57:32.790 --> 00:58:01.060

Stephanie Bogan: but you haven't turned that flywheel into high gear yet. That doesn't mean it's not possible or available. You could pick any one of the things that Gem or Leland mentioned, and knock those out in 2 or 3 weeks with some dedicated time. Seriously, we're not talking months and months we're talking about like, what's the biggest lever you can pull? Get that knocked out in the next 30 days. If you're not, you know 100% certain about like, just get the draft done because that's 80%

382

00:58:01.060 --> 00:58:27.899

Stephanie Bogan: of right, the barrier that holds you back. But, Jim, it's really great to see all the changes that you've made over the years. And to just see again. Like, now, you're like, I'm gonna show up. I'm gonna pick my priorities. I've got my process for knowing what to focus on in my practice. When things right, when you realize there's opportunities for improvement, you can identify them, figure out how to solve for them, and you've got he's got. You know how we talk so much about the system has to be stronger than the resistance it will face

383

00:58:28.100 --> 00:58:30.700

Stephanie Bogan: so for Jem, part of that mastermind

384

00:58:31.220 --> 00:58:56.749

Stephanie Bogan: which we didn't limitless in the past, as Jim noted. If you pick a mastermind they can go really great. If you put them together, they can. Sometimes they don't click next year. We're gonna be doing a version of that with Buddy and accountability partners for those of you that want to do it. There's something really compelling about saying, Hey, even if it's like, Hey, I'm gonna check in with a weekly email and let this person know what I did relative to what I said I was gonna do right. And then, like a monthly or bi-weekly call can be really powerful.

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00:58:57.033 --> 00:59:03.829

Stephanie Bogan: So if you are around next year we'll talk to you a little bit more about that, because again, it's just another accountability system.



386

00:59:04.270 --> 00:59:15.879

Stephanie Bogan: which is all we're ever talking about. How do we make sure that we get clear? We get focused? And then we're able to execute on the things we need to to improve the practice. So, Jim, good to see all that great progress man.

387

00:59:15.880 --> 00:59:16.720

Jim Nowak, CFP®, AIF®, AAMS®: Thank you, appreciate it.

388

00:59:16.720 --> 00:59:19.350

Stephanie Bogan: I still can't find my reaction button, but if I could.

389

00:59:20.030 --> 00:59:20.750

Adam Cmejla, CFP®: I see.

390

00:59:20.750 --> 00:59:24.729

Stephanie Bogan: It's where it's like it was here. And now it's not here, which is funny.

391

00:59:24.730 --> 00:59:52.679

Adam Cmejla, CFP®: You bring that up. I saved that Forum post from, you know, like where it took like 9 months of me just kind of processing everything, and I saved, like the important parts of it, not even the entirety, but the important parts of that post. And it's 14 pages single spaced, which is the entirety of the back and forth between yourself, myself, a couple of other members that chimed in. So it's weird how there are just but a handful of moments in life that truly do chart our course differently.

392

00:59:52.890 --> 00:59:53.430

Stephanie Bogan: Yep.

393

00:59:53.490 --> 01:00:13.909

Stephanie Bogan: it's it's what we do with those moments, as I mentioned with them, like when you when you hit that resistance point when you're like. Oh, I'll do it later. I just don't know, or that is literally the ding, ding, ding button that says, actually, we need to do something different. Doing something different is, in fact, the very best thing we can do, because that's the pattern. Interrupt

394

01:00:13.910 --> 01:00:29.880

Stephanie Bogan: right? Put 10 min a day on your calendar to start a new behavior block time right? 2 HA week to work on things like something to disrupt the pattern, unless the momentum and the flywheel are moving in the way that you want, in which case you want to keep those things up right, and then double down, because.

395

01:00:29.880 --> 01:00:38.299

Stephanie Bogan: irrespective of whether your behaviors and your habits are positive or negative. Here's what I can guarantee you. Consistency compounds.

396



01:00:38.940 --> 01:00:53.599

Stephanie Bogan: You are creating more of what you're doing right now this day this week, this month? Right? So if we project that forward, is it going to get you more of what you want, or more of what you don't right, and that's where we have to insert ourselves and create change in the process.

397

01:00:54.300 --> 01:00:59.880

Stephanie Bogan: All right, Isaiah, man, I'm looking forward to share having you share your story with everyone. It's so cool.

398

01:00:59.880 --> 01:01:11.869

Isaiah Real: Yeah, absolutely. Well, well, I think all my materials taken care of. So I think, I think we're good here. Nonetheless. No thanks for having me guys and Stephanie High. 5 Christmas sweater.

399

01:01:12.303 --> 01:01:13.170

Stephanie Bogan: Thank you.

400

01:01:13.170 --> 01:01:38.730

Isaiah Real: There you go stole from my wife. So it's a little snug, but it's working but nonetheless. Jim Leland, you guys are rock stars. So damn high. 5. You guys. Thanks for having me. You know, this is my second full year in limitless and you know, like many others, you know. Yeah, white knuckle. That's definitely it should be limitless white knuckle advisor business, I mean.

401

01:01:38.730 --> 01:01:44.650

Stephanie Bogan: Stickers made white knuckle, and all I got was this lousy t-shirt and a white knuckle moment. That's right.

402

01:01:44.650 --> 01:02:08.591

Isaiah Real: I mean. Well, when I started last year, I mean White Knuckle was at the 1st summit. He says you should fire your your pain in the pain in the butt clients. I did that without thinking. I don't know maybe was a good thing, so I mean I lost 3 of my largest 5 clients. I was having a baby was buying a new house. A lot was happening, and you had little less than that. It's a lot but nonetheless.

403

01:02:09.010 --> 01:02:13.420

Isaiah Real: yeah. So for the last couple of years, you know, I've been able to

404

01:02:13.450 --> 01:02:39.047

Isaiah Real: grow my business in a way that I'm more time efficient than anything else. I'm not the biggest. I'm not growing the fastest, like a rocket ship, but I feel like I've gotten pretty darn good at getting really efficient with my time, and knowing what's important and what's not important, and saying yes, or, more importantly, saying, No on that end. And so I guess I'll start from the bottom and work my way up.

405

01:02:39.590 --> 01:02:46.489

Isaiah Real: Actually add Coach Adam was the one that sort of motivated me to join levelless I'll damn never shared this. But



406

01:02:46.780 --> 01:03:13.849

Isaiah Real: my wife's a schoolteacher, and so, you know, a goal for us was, hey? We had our 1st son last year. We want to grow our family, God willing, next year, so she would love to stay at home. I completely agree with that. And so a goal for us last year was, Hey, let's, you know, grow the business enough where you can stop working. We have some extra, and that you can stay at home. And then, on top of that, it was me being present with my son and my family.

407

01:03:14.163 --> 01:03:26.079

Isaiah Real: And so, like, Jim was saying, if you haven't already go online to tribe and write down what your number one goals are. Priorities are, because that was mine last year, and this year it did not change.

408

01:03:26.090 --> 01:03:49.170

Isaiah Real: Make enough to for my wife to stay at home, and also to be with my son, was able to achieve that this year, which is fantastic, got to think of. I'm already am, but I got to think of some new goals for next year. I never wanted to be that, you know. 40, 50, 60 h work, week work, Guy, I mean, I want to be present with my family, you know, God willing, you know.

409

01:03:49.230 --> 01:03:59.459

Isaiah Real: years from now I want to coach my son's t-ball team. What have you? And you know, pick him up. And from, you know, school, what have you? So that was really important to me, so joining, limitless it was.

410

01:04:00.000 --> 01:04:16.369

Isaiah Real: It was setting up the foundation for what I wanted my life and my business to look like moving forward. And so how I got there. I think it shows right, there was this specific year. Yeah, I was able to grow my business by 20%, which is awesome. And I was able to do it on average by working 13 HA week.

411

01:04:17.055 --> 01:04:18.960

Isaiah Real: And that wasn't

412

01:04:19.030 --> 01:04:36.710

Isaiah Real: a goal. It sort of just happened the reason for that was I work Tuesday, Wednesday, Thursdays, for the most part. So full day, Tuesday, Thursday, half day, Wednesdays, I watch my son on Monday, Fridays. So I'm Daddy Daycare on those days.

413

01:04:36.710 --> 01:04:50.640

Isaiah Real: And so it was imperative for me to be cognizant of my time. I couldn't waste time there was no time to waste, and so for me it was important, and this goes to the value pieces.

414

01:04:50.880 --> 01:04:53.839

Isaiah Real: And I'm asking myself the question of

415

01:04:53.860 --> 01:05:17.070

Isaiah Real: what can I do to cut down the hours that I work that provides more value and make more money for me? That's the biggest thing a big piece of that was last year in 2023. And Stephanie, you probably know. There was a gal that came on. She talked about. It was in the one of the virtual summits surveys to your clients asking good questions. So

416

01:05:17.390 --> 01:05:37.830

Isaiah Real: yeah. So that really resonated with me. And so I you know I never did that before. So after that summit the next week I made a survey to my clients, and I learned a lot what I thought was important to my clients, and service was actually entirely the opposite. I thought that having quarterly reviews with clients was important.

417

01:05:37.840 --> 01:05:41.480

Isaiah Real: They wanted biannual reviews. They didn't want to talk 4 times a year.

418

01:05:41.650 --> 01:05:50.079

Isaiah Real: Fine! I love it. That cuts back the time that cuts back the prep. The meeting time, the post meeting time. It cuts back a lot of hours there.

419

01:05:50.500 --> 01:06:16.309

Isaiah Real: I ask them what they're looking for for my specific clients, their retirees. They're not so much into the tax planning and maybe a little bit of insurance planning. But they really want to focus on the retirement planning piece. So we talk about their social security and their cash flow and their retirement planning. And yeah, we'll talk about investments. But that's what they want to focus on. So our conversations are geared and directed towards exactly that and nothing else. So when we do talk.

420

01:06:16.310 --> 01:06:27.170

Isaiah Real: they feel like, you know, Isaiah's listening. You know, we're talking about exactly what I want to talk about. And what do you know when I started doing that leads to more referrals, more impactful conversations?

421

01:06:27.609 --> 01:06:31.999

Isaiah Real: It was fantastic and then fast forward to this year

422

01:06:32.110 --> 01:06:40.650

Isaiah Real: 2024. I did another survey, and I found out that. And again, my clients are retirees. They don't want to meet in person anymore, and most of them are

423

01:06:41.230 --> 01:06:48.799

Isaiah Real: within 15 to 25 mile radius. So they're fairly close. I mean, I'm I'm here in Southern California. So yeah, the the freeways are a mess.

424

01:06:48.800 --> 01:06:49.540

Stephanie Bogan: Yeah, that's do it.

425

01:06:49.540 --> 01:06:49.999

Isaiah Real: Oh, my God.

426

01:06:50.500 --> 01:07:13.630

Isaiah Real: yeah. So I mean, maybe it's a little bit different. But nonetheless, that was a huge piece for me. So I'm closing my office and in January and going fully virtual. And so that's what worked for my clients. And so again, that's cutting back on the time, and the expenses and overall and everything else, and so and then the service were huge, and so I would highly encourage you guys. If you haven't

427

01:07:13.630 --> 01:07:29.599

Isaiah Real: ask your clients what they're looking for. It's not hard, it's very simple, and it makes the experience. It makes your relations with your clients that much better, I think, fast forward to the marketing wins. I had a niche, to begin with before I joined Limbalist, but I really went.

428

01:07:29.680 --> 01:07:38.640

Isaiah Real: I dove head into it when I started. It was, you know, have an itch. Mine was retirees, but I took it a step further, so I got even more micro

429

01:07:39.015 --> 01:07:52.909

Isaiah Real: I work with only one company. Their utility firm here in Southern California. So I did my best to become the go to Guy. You know. Then I was emailing Stephanie here a few weeks back.

430

01:07:52.930 --> 01:08:19.679

Isaiah Real: Right now I'm gonna be starting, making white papers, going for 2025 making videos. I had some templates. I had some things already built which I would share with them. But my number one focus is, I want to be that guy. So when these people call from the company, I want to talk to Isaiah. This is the person my friends have gone to them. My coworkers have gone to them. They know my retirement plan better than I even know my retirement plan. That's what I wanted to do. And that has led to

431

01:08:19.700 --> 01:08:37.320

Isaiah Real: 90% of my clients now are from this company, and basically all of my clients. Now come from this single company, no one else, and you know for me, like I mentioned in the beginning, I'm not trying to become a billion dollar firm at the moment. I just need 5 to 7 really good clients a year. That's all I need.

432

01:08:37.649 --> 01:08:51.150

Isaiah Real: Each of these clients have 1.2 million to 2 million bucks on average, and they're awesome people. And so that's why I focus on that has allowed me to be less stressed because before I joined limitless, it was

433

01:08:51.270 --> 01:08:59.050

Isaiah Real: okay. I need to find, you know, 1525 new clients I need to get, you know, to, you know, 15 million in new assets. No, no, no! Just

434

01:08:59.069 --> 01:09:14.950

Isaiah Real: what's important to you. What's important to your life. What's important to your business and your family, and work about that way. And so for me. Now it's 5 to 7 new clients a year, that's all I

need, and making the specific marketing content for those company for the employees of there. So that

435

01:09:14.960 --> 01:09:19.559

Isaiah Real: we do talk. They have some familiarity with me. They have an idea of who I am.

436

01:09:19.910 --> 01:09:44.249

Isaiah Real: Jim mentioned the loom videos. I live with loom videos, and Adam. Yeah, I mean, I I do that. When I talk to a new prospect I send them a 1 min loom video. And I get the same thing. This is amazing, you know, took 60 seconds, but to them it's it's a huge difference. Same thing for clients, too, to save on time. You know the client profitability analysis. I think right? That one.

437

01:09:44.660 --> 01:10:14.109

Isaiah Real: you know, I learned that 20% of my clients give me about 85% of my revenue. So why am I spending, you know, and I love all of my clients. But you know, why am I spending equal time for every every single one of them when there's about 15 to 17 good clients that give me most of my my revenue. So I'm gonna spend most of my time there, and that's where you know, for the other ones. I send them loom videos. It has that personal feel. It has that touch. They feel like we talk. They feel like we, you know

438

01:10:14.240 --> 01:10:21.169

Isaiah Real: they have that interaction with me, and that works just as well. So those are the marketing wins. Mindset win.

439

01:10:21.350 --> 01:10:25.014

Isaiah Real: I think I word vomited a little bit when I was writing this one, so I guess

440

01:10:25.480 --> 01:10:46.259

Isaiah Real: The difference for that is, you know, when I started limitless, and at times it still happens, but nowhere as close as before. You have that imposter syndrome, you know you're not good enough. You're not big enough. You're not growing enough. You're not doing enough for your clients. When you begin to finally have some structure, some processes for me, it was

441

01:10:46.440 --> 01:10:57.169

Isaiah Real: in 2023. So my 1st year in limitless. Because I had a newborn. I was getting 2 h of sleep. I couldn't focus on 4 different things. I could only focus on one thing. So for me, it was.

442

01:10:57.420 --> 01:11:16.899

Isaiah Real: I'm gonna write down what I'm doing on a daily basis and see if I can make a template or see if I can make a process for it to make it easier for me in the future. That's what I did, and so every single thing I have now has a template or process. You don't realize how many hours you write emails to clients, or send docuSign or do onboarding

443

01:11:16.900 --> 01:11:31.590

Isaiah Real: when you have a template for that you pre-populate, it fills in the name. Maybe you change a sentence here or there. You multiply that by hundreds of times a year that saves countless hours. Which means why I'm working less than you know that 13 h span



444

01:11:31.899 --> 01:11:46.430

Isaiah Real: same thing for processes, too. I mean client onboarding. We did the same thing. You know, and I forget who it was. Thank you to the library, because I took a good chunk of that made it my own and and made my own onboarding process.

445

01:11:46.770 --> 01:12:03.609

Isaiah Real: you know all of that really helps. And so, by having a process by having templates, I feel like you have control, which gives you some clarity which obviously leads to some peace of mind. And so, because of that, it's allowed me to feel now that I'm not running around with my head cut off.

446

01:12:03.610 --> 01:12:23.350

Isaiah Real: you know. I have a process. I know what I'm going to be doing on Tuesday. I know what I'm gonna be doing on Wednesday. I know what I'll be doing on Thursday. And so it's huge on that. And I have to add in the what is your ideal week? Right? I mean what you're gonna do Monday through Friday. That's what I live by. You know. What are you gonna be doing so?

447

01:12:23.350 --> 01:12:36.853

Isaiah Real: The client calls on, you know. Monday. Great, I'm gonna talk to you on Tuesday. That's when I do all my client stuff. And Thursdays are my marketing days, and Wednesdays are my, you know the combination of client service, and and

448

01:12:37.160 --> 01:12:56.849

Isaiah Real: you know, compliance stuff, or what have you? And so it's important to be organized in that sense. And then, obviously, that's led to. Yeah. This year, we've had a good year we're up 20% and based off our aum. And so yeah, it's been a lot. It's been a process. But like, you know, Leland said. And, Jim, if you could focus on one or 2 things or just a few.

449

01:12:56.910 --> 01:13:04.709

Isaiah Real: and just we get really good at that. You know, it can have tremendous impact on on what you're looking to do. So

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01:13:05.510 --> 01:13:06.280

Isaiah Real: that's what I'm sure.

451

01:13:06.280 --> 01:13:28.749

Stephanie Bogan: Well, it is interesting, Adam. I remember our early conversation once the fly will gets going. You guys just call me. And you're like, Hey, here's what I'm doing. What do you think? Right in the beginning there's that element of like getting it going. And I think we think you guys tell me, because you've all been through it from a different place than I have. Like our brains right? We just start to think like, Oh, it's so big it's so much.

452

01:13:28.770 --> 01:13:57.290

Stephanie Bogan: And so we don't attack it because our brain wants to be like, let's go find 4 days to no, that's never gonna happen unless you block out 4 days, which you could do right now on your annual calendar, right? Because that makes it a decision and a commitment. And then we can sit in the space of



just asking yourself what it will take to make it happen. The thing that I think is so remarkable about your story is everyone I love about. Limitless is, the community is so supportive, and everyone's like, oh, that was great. High 5 high 5, which is awesome

453

01:13:57.290 --> 01:14:10.260

Stephanie Bogan: right? And notice Isaiah started with, well, I'm not growing as much as the others, but but if you can grow 21% in a year, that's double digit growth in 13 to 14 HA week.

454

01:14:10.410 --> 01:14:19.490

Stephanie Bogan: Yeah, that's like a huge epic win. Most people can't create. Most advisors struggle to create that kind of growth in 40 or 50 HA week.

455

01:14:19.580 --> 01:14:34.957

Stephanie Bogan: So Ben Brandt, who many of you remember, had 6 kids. So he was like, Hey, I need to get like having a lot of kids is one of the reasons, right? Some of us want. I don't have a lot of kids. I just have 2 high maintenance ones. Right? We want a lot of that time. I'm just being honest. Plumb to death.

456

01:14:35.470 --> 01:14:51.049

Stephanie Bogan: and those are those are goals that you know, traveling. I love people like, Hey, I want to travel or like it's about experiences. And so what I really hope Isaiah's example, highlights, is how much waste

457

01:14:51.990 --> 01:14:54.189

Stephanie Bogan: is in our average week.

458

01:14:55.310 --> 01:15:23.168

Stephanie Bogan: like, I'm sure is efficient like, for sure. But he's not explained. Some god like level of efficiency, like, Oh, I've taken Adam stuff, and quite, you know, like, no, he's doing the stuff we teach you to do Brian boss, who's 1 of next year's alumni coaches right got there. He has systems and checklists. He didn't even have to get to right where he's automated. Everything he just standardized and systematized it so right? So his staff could essentially do that.

459

01:15:23.740 --> 01:15:50.770

Stephanie Bogan: Which is what I love is that you were very conscious of the choices you were making right what you were going to work on next. And so it it doesn't feel like a project and another project are going to radically change your practice. You're not like, oh, I'm going to build a service model, and I've got 21% growth in 5 years. Maybe, like your brain doesn't sit in that space. Your brains are hardwired to focus on the problems, not the possibilities, on the obstacles, not the opportunities.

460

01:15:50.870 --> 01:15:53.099

Stephanie Bogan: It is picking, something

461

01:15:53.110 --> 01:16:22.450

Stephanie Bogan: engaging with it, being willing. When I write. I write for the trash can like you just have to do the draft to get it out there. That's why roadrunner right rip off and deploy refine until no new edits are required. You don't even have to. Jed was like I took the sales process. I literally cut and paste it.



That's what I used it works. I didn't even need to tweak it if you want to tweak it. Great people do it all the time. But literally the answers to your biggest problems

462

01:16:22.700 --> 01:16:35.019

Stephanie Bogan: are sitting right here. They're on these calls. They're in the library. You can literally, after this call over the next few weeks, go in. Pull out the next big one, noticing a theme. Here.

463

01:16:35.090 --> 01:16:51.990

Stephanie Bogan: right? What's the next big lever that you can pull between now and year end? Do not let your brain do that like we're just gonna finish out the animal, start fresh in January. Loves to tell you that, and then it'll tell you're gonna set a bunch of big goals which on your own you're gonna forget by February 13, th according to the data

464

01:16:52.350 --> 01:17:04.999

Stephanie Bogan: right? Your job is to insert yourself in that system. So it doesn't have those breakdowns. So yes, Bridget, 2025 starts today. I love it. That's a great way to look at it. 2025 starts. Now.

465

01:17:05.440 --> 01:17:15.319

Stephanie Bogan: what are you gonna do in the next 30 days to fully prime the pump right for that flywheel to really be moving when you hit January.

466

01:17:15.330 --> 01:17:23.499

Stephanie Bogan: What's the big thing you want to work on? What are the next steps? You can be taking block that time in your calendar. Get it done.

467

01:17:24.050 --> 01:17:31.820

Stephanie Bogan: Isaiah. That's a great great story. If you guys have any questions for Jim, Isaiah or Leland feel free to jump in. I know we've been chatting

468

01:17:31.950 --> 01:17:35.329

Stephanie Bogan: and getting all those high fives and inspirations. It's

469

01:17:36.120 --> 01:17:42.190

Stephanie Bogan: what would you say, Isaiah, just in terms of kind of the growth relative to the time?

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01:17:42.380 --> 01:17:45.170

Stephanie Bogan: What were the one or 2 things that you think

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01:17:45.200 --> 01:17:56.630

Stephanie Bogan: most kind of created that flywheel, so that growth and time were basically no longer connect like they were decoupled right. It used to be time created growth. And you kind of broke that formula.

472

01:17:57.530 --> 01:18:11.999

Isaiah Real: I think it was actually more the mindset piece of knowing, you know. Well, what do I want this to look like? And what do I want my life to look like? Because I mean here in Southern California, right? So when you go to a lot of these things, they're all we're 1 billion dollar firms and nothing wrong with that.

473

01:18:12.000 --> 01:18:33.229

Isaiah Real: But you know it's that's which you're surrounded by. And for me, it wasn't that. So, as you know what I don't want that I just want to practice that, you know. You know, I can get to a specific dollar amount, sure, and my wife can stay home and do that. That right there just freed me from the stress of. I need to grow by this specific dollar. I need to get here because that's going to get me to this point.

474

01:18:33.300 --> 01:18:46.200

Isaiah Real: It was, you know what? I'm just gonna focus. I need 5 to 7 clients, that's all I do. And so how can I get 5 to 7 clients? And it's through this company? Great, what I need to do. I want to start making some templates, so I can share with them to educate them about their retirement plans.

475

01:18:46.470 --> 01:18:46.820

Stephanie Bogan: Yep.

476

01:18:46.820 --> 01:18:47.440

Isaiah Real: So.

477

01:18:47.440 --> 01:18:58.640

Stephanie Bogan: Well right that we say all the time. If you can standardize it and systematize it, you can scale it, and by scale to Isaiah's point. It doesn't mean you have to go out and build a billion dollar firm. It means you can click a button and touch

478

01:18:58.680 --> 01:19:09.320

Stephanie Bogan: a hundred people with the piece of content or a value add, or an email or a loom video, right? And and they see what we're shooting for is that I see you. I hear you. I understand you.

479

01:19:09.320 --> 01:19:18.080

Stephanie Bogan: And you'll notice that all of today's success stories went through very SIM right. The same kinds of lessons and and conversations that we have.

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01:19:18.080 --> 01:19:41.840

Stephanie Bogan: The distinction is that as they executed each of those changes, it just compounded and compounded and compounded, until that became the momentum over the old way, and that's that shift we talk about in terms of, I think, to your point around mindset, Isaiah. It's really like learning to lean in and know if anyone skis right. If you you get wobbly and you you sit back on your skis bad you do.

481

01:19:41.980 --> 01:20:00.890

Stephanie Bogan: It's like the worst thing you're supposed to do the exact opposite. And so we talk about all the time right turning into the skin, doing the thing that that is the most uncomfortable which is making time and making changes. Those are the 2 things that our brains are really hardwired to keep us



from doing, making time to make changes

482

01:20:02.141 --> 01:20:09.740

Stephanie Bogan: jim had a question how you documented the templates and processes do that manually. Did you use systems tech stack.

483

01:20:10.322 --> 01:20:17.920

Isaiah Real: We use a combination. So actually in between joint limitless, we changed our Crm so we had

484

01:20:18.010 --> 01:20:22.709

Isaiah Real: act, or swift pages before, which just felt like I was in 1990.

485

01:20:23.040 --> 01:20:24.779

Stephanie Bogan: I remember Act. It is from 19.

486

01:20:24.780 --> 01:20:26.360

Isaiah Real: It was. Basically, you know, it was.

487

01:20:26.816 --> 01:20:27.730

Adam Cmejla, CFP®: It was.

488

01:20:27.730 --> 01:20:34.060

Isaiah Real: Word documents. So basically, word documents copy paste put it in there. So it was still some time. But at least I had some

489

01:20:34.490 --> 01:20:52.469

Isaiah Real: a Pdf. Or a word, Doc, so I had it there, so I can copy paste it now. It's we use wealthbox. So it's now it's just pre populated in there. So you know, emails, templates that kind of thing. We have it built in. And so now, it's if I need to send an email. Click changes the name, maybe change the thing. Boom done.

490

01:20:52.470 --> 01:20:52.910

Stephanie Bogan: lf.

491

01:20:53.389 --> 01:20:54.189

Isaiah Real: So it's.

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01:20:54.190 --> 01:21:01.819

Stephanie Bogan: Yeah. And I know Adam, like Adam, has right automated everything via redtail and workflows, which is awesome.

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01:21:01.840 --> 01:21:26.609

Stephanie Bogan: But keep in mind, is all things that limitless. Think of like layers. Right? That 1st layer is



to standardize and systematize. That could literally be some automated emails in your Crm and or text expander. If you don't have text expander, you should all go out and get it immediately. I can literally write like hashtag S, and my whole signature block pops up, or an email, or really anything that you want.

494

01:21:27.374 --> 01:21:38.980

Stephanie Bogan: So literally, just documenting forms, worksheets, emails, scripts like, right? Take the process in your head, and just put it on paper all by itself

495

01:21:39.170 --> 01:22:07.940

Stephanie Bogan: massive. If you then go to Crm and text expander, next level and right, Isaiah and Brian doing great without getting to 90 workflows. And then yes, absolutely. I am a huge fan of right as much as you can, moving into automated workflows. Once you've kind of got that, because now, right, it will tell you, plus 3 days or minus 3 days, or assign it, whereas in the Crm you're kind of doing that more manually, but it's the process that will save you.

496

01:22:08.140 --> 01:22:24.970

Isaiah Real: Yeah, I would. I would say to just before you start that because it gets really overwhelming trying to build all those workflows. But just write down what you're doing on a daily basis for like 2 weeks. What what am I doing? Emails, templates, setting new pro whatever you're doing? Just write it down and see what you're doing first, st and then build templates from there.

497

01:22:25.680 --> 01:22:32.990

Stephanie Bogan: For sure, and there's lots of examples in the library. So for the most part, there, you've got a good starting point on a lot of things as well.

498

01:22:33.550 --> 01:22:43.940

Stephanie Bogan: Isaiah, that's great. Yeah. So if I think about your growth rate and obviously not your immediate goal. But right, if you think about. What could Isaiah's growth rate be if he chose to turn it up

499

01:22:44.230 --> 01:23:04.529

Stephanie Bogan: because he eliminated everything that does not elevate the practice, support the practice, grow the practice right. If it is not clearly additive above the line for the practice it has to go. I know right when my son was born right, you've all heard the story right? It was like, I have a pre meet. I have to be home at 5 30.

500

01:23:04.650 --> 01:23:17.749

Stephanie Bogan: Suddenly I was like, I can't send an email all day. What am I doing like? It was a forcing mechanism for me to be like, oh, I can't do that. Can't do that definitely definitely can't do that

501

01:23:18.980 --> 01:23:33.209

Stephanie Bogan: for most of us like we don't have that forcing mechanism. But if I said, you have to leave at this time every day, or your hands will get cut off, or your children will be taken, or you'll lose your net worth. You would find a way or make one

502

01:23:33.950 --> 01:23:39.960

Stephanie Bogan: you would. And so that's the difference is right. What's that compelling motivation

503

01:23:40.220 --> 01:23:48.969

Stephanie Bogan: that's gonna get you over those white knuckle moments when your knees are knocking, which they should be at least some of the time.

504

01:23:49.360 --> 01:23:57.260

Stephanie Bogan: because if they're not knocking, you're not stepping it up, and that's okay. If you're where you want to be. But you're all here because you're here for that step up.

505

01:23:57.320 --> 01:24:03.450

Stephanie Bogan: So I just love this idea that if you got really clear on what was additive.

506

01:24:03.490 --> 01:24:22.430

Stephanie Bogan: and you cut out everything else. That's what Ben Brandt. He called me up, and he said, if you can make 7 figures a year, working 25 HA beach from the beach in Costa Rica. Surely I can do it from my office in what is Minnesota, North Dakota, right up in the frozen tundra, and I was like sure why not?

507

01:24:22.610 --> 01:24:31.680

Stephanie Bogan: Literally, he was like, All right one year from now and then. Boom! He's an he's like he got. He's like half time off. He's got a service advisor now, managing most of the clients.

508

01:24:31.850 --> 01:24:36.739

Stephanie Bogan: But it was that moment of decision. And that's why

509

01:24:37.030 --> 01:24:43.290

Stephanie Bogan: I literally chose chief possibility officer as my title. Everyone can executive officer. It didn't even mean anything

510

01:24:43.490 --> 01:24:52.210

Stephanie Bogan: right. Chief possibility is, it's always my job to sit in the space and remind you, nudge you tap, you, disrupt you to be like hey?

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01:24:52.470 --> 01:24:55.430

Stephanie Bogan: Don't forget what's possible for you, hey?

512

01:24:55.490 --> 01:25:06.789

Stephanie Bogan: Don't forget that your next level is waiting for you, hey? Don't forget to be really clear about what's standing in your way, because it's not real right. It's just stuff that you need to get clear on so you can step over it

513

01:25:06.790 --> 01:25:27.240

Stephanie Bogan: and take that uncomfortable step. That's what limitless is about. The difference is we



want to be there, of course, with the coaching, the content, the community to support you through that. The one thing we cannot do, and I promise you we're up in the game next year to get as far as we can is I cannot come to your office and do the work for you.

514

01:25:27.590 --> 01:25:36.680

Stephanie Bogan: I did not come to Isaiah's office and stand over his shoulder and say, Do the work, his commitment to his big? Why did that for me?

515

01:25:37.630 --> 01:25:39.020

Stephanie Bogan: So if

516

01:25:39.120 --> 01:25:45.349

Stephanie Bogan: you have not made the changes that you hoped or wanted to this year. We're all in on helping you.

517

01:25:45.530 --> 01:25:55.489

Stephanie Bogan: but you've got to get really clear on what the why is because it is the only thing that will get you over the what ifs and the white knuckle moments?

518

01:25:55.780 --> 01:25:58.399

Stephanie Bogan: You've got to want it more?

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01:25:58.460 --> 01:26:03.420

Stephanie Bogan: Then you want anything else. And, Isaiah, you said something that I thought was really good when you started.

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01:26:03.710 --> 01:26:10.870

Stephanie Bogan: so I'll end here, which was, you said something along the lines of every time I say yes to one of these things

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01:26:10.990 --> 01:26:14.080

Stephanie Bogan: I'm saying yes, to staying in the office when I don't want to be here.

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01:26:14.240 --> 01:26:14.880

Isaiah Real: Yeah.

523

01:26:15.160 --> 01:26:18.089

Stephanie Bogan: Every time that you say yes to a compromise.

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01:26:18.880 --> 01:26:24.889

Stephanie Bogan: you were saying yes to the status quo, and you are very clearly saying no

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01:26:25.070 --> 01:26:27.209



Stephanie Bogan: to the goals that you set out

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01:26:27.740 --> 01:26:46.349

Stephanie Bogan: those goals. That's why setting them out. Adam's got a posted, and like his one page plan on a piece of paper. It does not need to be a 92 page business plan. It can literally be a posted. It has to be something where you decide what matters. And why? That you look at regularly?

527

01:26:46.350 --> 01:26:58.500

Stephanie Bogan: Because that is the most important thing to reorient your brain to the new outcomes that you want to create. The second thing is, you have to put time in your calendar. Adam's success did not fall in his lap.

528

01:26:59.080 --> 01:27:18.899

Stephanie Bogan: He listened, he waited, he shared. He put himself out there. He turned the flywheel. He turned the flywheel. He turned the flywheel. Consistency compounds 2 times x 3 x 4 x 5 like. Now Adam just gets to decide what he wants. How big, literally he sits in the seat of how big do I want to be? How fast do I want to grow. How much risk do I want to take?

529

01:27:19.260 --> 01:27:28.970

Stephanie Bogan: Doesn't mean it's not scary, or there aren't moments, but it's radically different than it was 6 years ago where it was like I don't know. Can I? Should I do? I have permission?

530

01:27:29.010 --> 01:27:43.890

Stephanie Bogan: That is the shift that I hope more than anything you got out of this year was that you understand that being above the line in that mindset is about being clear and conscious and confident in the choices that you make. It's about being empowered

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01:27:44.460 --> 01:27:52.589

Stephanie Bogan: which will solve for everything else. You will always find a way or make one. If you're not the most important question you can ask yourself is.

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01:27:52.820 --> 01:27:53.830

Stephanie Bogan: why not?

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01:27:54.670 --> 01:27:56.929

Stephanie Bogan: So Michael and I were on a call for leaders

534

01:27:57.200 --> 01:28:05.810

Stephanie Bogan: we're doing. He's doing leaders with us. He'll do lifestyle next year as well. But he's super deep in leaders with us. We're on leaders. And we asked everyone. So I'm gonna ask you all

535

01:28:06.080 --> 01:28:16.340

Stephanie Bogan: we're we're I'm channeling Michael for a moment. Everyone put in. We've talked a lot about levers. You can pull. What's the one big lever that you know. You need to pull



536

01:28:16.680 --> 01:28:21.900

Stephanie Bogan: that you're like I need to solve for this, even if you don't know how you're gonna solve for it. Drop it in the chat right now.

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01:28:23.070 --> 01:28:27.000

Stephanie Bogan: Julie, Jed, mark, chat, drop.

538

01:28:29.620 --> 01:28:31.440

Stephanie Bogan: Give everyone a second to do that.

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01:28:31.750 --> 01:28:47.690

Stephanie Bogan: Marketing, making email, comp ideal week, reducing hours, more marketing, branding, rebranding, ideal client. So drop those in.

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01:28:48.130 --> 01:28:54.380

Stephanie Bogan: So everyone drops in, and then Michael literally looks at the screen and he goes. You've all done hard stuff before. Yes.

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01:28:54.650 --> 01:28:55.510

Stephanie Bogan: yes.

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01:28:55.950 --> 01:28:59.879

Stephanie Bogan: Why haven't you done that thing in the chat. You already know. It's a problem.

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01:29:02.660 --> 01:29:05.170

Stephanie Bogan: And I was like, you just pulled a staff right there.

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01:29:05.400 --> 01:29:11.319

Stephanie Bogan: He was like, why haven't you done it yet, and everyone was like, I don't know. Why haven't I done it yet? And I'm like, that's kind of the point of the conversation.

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01:29:11.810 --> 01:29:13.930

Stephanie Bogan: So reflect on this year

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01:29:14.150 --> 01:29:24.630

Stephanie Bogan: we are absolutely taking steps to step up that scaffolding and that support structure that we give you. But you should also not use that as an excuse. Isaiah, Adam.

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01:29:24.660 --> 01:29:54.200

Stephanie Bogan: Jim Leland, and countless others are an example that if you show up and put in some time and effort, even if you're air balling it the best that you can. Good things are going to happen that that dial is gonna start to move, and if you keep it up. It's gonna move more and more. If it's not moving. If the flywheel isn't going at the way or the pace that you want, the number one question you can ask



yourself is, what are you letting hold you back?

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01:29:55.700 --> 01:30:04.170

Stephanie Bogan: And then my new favorite coaching question I can't remember. Maybe Adam remembers it's from a Tim Ferriss, podcast some great coach whose name I do not recall.

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01:30:04.735 --> 01:30:05.250

Stephanie Bogan: Fabulous.

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01:30:05.250 --> 01:30:06.220

Adam Cmejla, CFP®: Jerry Colonna.

551

01:30:06.550 --> 01:30:07.349

Stephanie Bogan: Who was it?

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01:30:07.600 --> 01:30:09.320

Adam Cmejla, CFP®: Jerry Colonna.

553

01:30:09.320 --> 01:30:09.690

Stephanie Bogan: Great.

554

01:30:09.690 --> 01:30:10.080

Adam Cmejla, CFP®: However.

555

01:30:10.080 --> 01:30:10.490

Stephanie Bogan: Great.

556

01:30:10.490 --> 01:30:10.879

Adam Cmejla, CFP®: Go ahead!

557

01:30:10.880 --> 01:30:11.490

Stephanie Bogan: Go ahead.

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01:30:12.110 --> 01:30:13.050

Stephanie Bogan: You can ask it now.

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01:30:16.420 --> 01:30:45.260

Adam Cmejla, CFP®: It's it's 1 of those quotes that, like you remember, like, I remember, multiple different places on the Monon trail here in Indianapolis. When I 1st listened to Stephanie's conversation with Michael, on which, if you haven't listened to that, please go do it. It's if for no other reason. It's a great trip down Memory Lane of reconciling what Steph was talking about in what? At that time early 2017



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01:30:45.780 --> 01:30:51.003

Adam Cmejla, CFP®: And and where things are right now, spoiler, alert, it's the same shit it still works.

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01:30:51.540 --> 01:30:57.631

Adam Cmejla, CFP®: So this this other quote from Jerry Colonna, who coached a lot of a lot of

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01:30:58.500 --> 01:31:22.599

Adam Cmejla, CFP®: high profile athletes and Olympic athletes. He was responsible for working with Dan Jansen and helping him mentally get over 35 seconds for the 1,500. So he had Dan write 34.9 9 on a journal every single day, and write why, he was going to break 1,500. But the the quote is, how have I become complicit in creating the conditions? I say, I don't want.

563

01:31:24.740 --> 01:31:52.810

Adam Cmejla, CFP®: which is a really powerful self, reflective exercise to go through as you're taking inventory. I chatted about this earlier tomorrow. I'm leaving for Charleston and gathering my entire team. We're all getting together in Charleston to plan 2025. So we all have our calendars. We're all writing those things down. We're all spending our personal time off 1st and using our time off as a forcing mechanism to essentially see what's left of the year, and how much work we want to actually do, or

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01:31:53.110 --> 01:32:02.007

Adam Cmejla, CFP®: you know, to to figure out how much time of the year is left to fit in the goals that we have for the business, and reconcile that against the goals that we say we want the business to do

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01:32:03.230 --> 01:32:04.869

Adam Cmejla, CFP®: but the

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01:32:05.060 --> 01:32:30.449

Adam Cmejla, CFP®: part of that inventory is going back over our calendars. That's why I mentioned using clockify right? What gets measured, gets managed and gets managed, gets improved, is inventorying what you are spending your time doing right now. And how are those activities being contributory to the conditions that you say you don't want in your life. And then determining, Okay, how am I? Gonna 3. D. This? How am I gonna either dump it, defer it or delegate it.

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01:32:30.920 --> 01:32:31.470

Stephanie Bogan: Yep.

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01:32:32.350 --> 01:32:41.990

Stephanie Bogan: yeah. My variation on that is, I wrote it down and that you guys can write that down. It's a great quote my variation on that is, how are you complicit in the situation? You are now complaining to me about.

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01:32:42.680 --> 01:32:43.370

Adam Cmejla, CFP®: Nice.

570



01:32:43.370 --> 01:33:06.820

Stephanie Bogan: I get a lot of well, my clients, this, and then I'm like, Well, how are you? And they're like, Oh, well, I guess I? Who? Who? Who prospected those clients? You did? Who said yes to them? Who did? Who's in charge of the fee you are? Hmm! I'm starting to see a problem here, and I don't think it's the clients right? I say this with all love and respect. I genuinely hope you get it. You guys are the common denominator in your situation.

571

01:33:06.910 --> 01:33:26.810

Stephanie Bogan: positive or negative, and it's usually a mix of both. We just have a lot of the distraction and the waste and the squishiness around the edges, and what you've hopefully heard, Adam, over the last few years. Jim. Right, Leland, Isaiah. What you're hearing is clarity. I know what I want and why

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01:33:27.010 --> 01:33:47.830

Stephanie Bogan: focus. I know what I need to work on or what I've chosen to work on next, like, Okay, I'm gonna airball it and see if it turns out okay, it usually turns out okay, right? And then I need to get to work. What's my system for actually aligning my wishes with my actions. We like to call that your calendar your schedule like that time thing truly matters. Adam

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01:33:48.160 --> 01:33:49.629

Stephanie Bogan: still works on his time.

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01:33:50.020 --> 01:33:56.230

Stephanie Bogan: Michael, in our coaching calls. Do you know what we still talk about? A lot time? Always a conversation.

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01:33:56.850 --> 01:34:03.940

Stephanie Bogan: Well, hey? As you change as your practice change how to use your times. The kind of meetings you have like that is, you're never gonna be done.

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01:34:04.070 --> 01:34:16.060

Stephanie Bogan: I'm never like this, is it? Like, I'm literally sitting down with my new a like. Here's the schedule next year. Let's talk about. We want to change what really worked right block. So it is about creating the clarity.

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01:34:16.310 --> 01:34:44.230

Stephanie Bogan: the transparency right? Whether it's your post, it writing your goal in your journal. How do you keep yourself really locked on? And then how do you keep yourself consistently working at it. The number one thing you can do right. Success shifters time on your calendar is make sure that you're accountable to doing the things that you say you want to do. They're going to move the needle in your practice. So it's not doing too much right, getting really clear on what's going to move the needle.

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01:34:44.230 --> 01:35:04.440

Stephanie Bogan: getting focused on the one or 2 things you could be working on, and then making sure you've got time on your calendar to execute on those each quarter. You're going to see that needle move, and over the course of a year you would be amazed how much progress you can make over the course of 2 or 3. You can build a million dollar practice in a life that you truly love.



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01:35:04.718 --> 01:35:20.299

Stephanie Bogan: which you may have guessed is for me kind of the big big win. You know, making money is great. I'm not going to discount that. The more you have of it the less you seem to value, I mean, yes, obviously, we all like making more money. But what you learn here, I hope.

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01:35:20.300 --> 01:35:29.780

Stephanie Bogan: is that there's a difference. What you heard, Adam explain was that he sits down and puts his life in his calendar.

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01:35:30.070 --> 01:35:39.139

Stephanie Bogan: and then, with the time that is left, he decides how to hit his goals the same as I do, and Michael and many of you. At this point

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01:35:39.410 --> 01:35:44.089

Stephanie Bogan: we do not go working, and then see what's left at the end of the year.

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01:35:44.870 --> 01:35:49.320

Stephanie Bogan: because if you do it that way there won't be near as much left as you want.

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01:35:49.820 --> 01:36:04.229

Stephanie Bogan: It is about making a commitment to the practice and life you want to create, and then applying that. So your calendar is that commitment your calendar turns those wishes from your vision into a reality that you can actually execute.

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01:36:04.280 --> 01:36:12.169

Stephanie Bogan: So again, mindset vision and time are those core lessons that are gonna radically shift the game because they create headspace

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01:36:12.220 --> 01:36:19.879

Stephanie Bogan: and calendar space to implement the changes that you need to make. If you've got headspace and calendar and time.

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01:36:20.000 --> 01:36:22.020

Stephanie Bogan: you can do anything

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01:36:22.170 --> 01:36:30.740

Stephanie Bogan: if you don't have the right headspace and you don't have the ability to create time and focus it. You're gonna work really hard and not see much change at all.

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01:36:31.270 --> 01:36:47.980

Stephanie Bogan: Leland. Jim, Isaiah, thank you so much for sharing your success stories. It really is fantastic to see the changes that you've all gone through. Adam. This is Adam's final year as an advisor coach. After 5 years he's gonna go keep growing his practice, and he'll be back to visit



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01:36:48.255 --> 01:37:06.470

Stephanie Bogan: Brian boss and Jed Levine, our next year's practice coaches they have very much followed in our and Adam and the team's footsteps. They they now have those 1 million dollar practices, ample free time, low stress, like they really do have the ability to walk up to the wall, pull the lever and decide what they want to do next in their practice, and that is

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01:37:06.470 --> 01:37:33.729

Stephanie Bogan: certainly the empowerment that we hope all of you leave this year with. If you're joining us again next year, very much looking forward to it, and the changes get ready to turn it up a few notches if you're not still time to change your mind to. If you're not going to do that, for whatever reason, with all love, genuinely hope it's been a great experience for you. Please give us your feedback. I know that you were always a member of the tribe. I think we have office hours on the 9, th so Adam and I will be there

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01:37:33.900 --> 01:37:40.189

Stephanie Bogan: to answer any final questions and say our goodbyes for the year, but other than that, we will see you in 2025.

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01:37:40.440 --> 01:37:45.919

Adam Cmejla, CFP®: I need an export of this chat because this needs to go in my wins in my wins notebook. I appreciate you all. Thank you so much for the, for the.

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01:37:45.920 --> 01:37:49.100

Stephanie Bogan: That is awesome. Let me get a screenshot because.

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01:37:49.100 --> 01:37:50.640

Adam Cmejla, CFP®: That's okay. I already did it. It's good.

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01:37:50.640 --> 01:37:51.660

Stephanie Bogan: Alright. Did you get it? Alright!

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01:37:52.045 --> 01:37:53.200

Stephanie Bogan: Isn't that cool?

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01:37:53.200 --> 01:37:56.540

Stephanie Bogan: Well, he's gonna come for his specs. He's gonna be like.

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01:37:56.980 --> 01:38:00.440

Adam Cmejla, CFP®: You. You had me at the Park City ski day, so

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01:38:01.070 --> 01:38:09.299

Stephanie Bogan: Yes, you are forever grandfathered into team for sure. Alright, everyone happy. Monday. Remember, your mission



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01:38:09.430 --> 01:38:16.660

Stephanie Bogan: is to start 2025 today. Starting today, I'm going to spend the next 30 days doing what?

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01:38:16.910 --> 01:38:23.170

Stephanie Bogan: So that in 30 days you can look 2025 square in the eyes and say, I told you so. Let's do this

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01:38:23.550 --> 01:38:26.170

Stephanie Bogan: alright. You guys have a great day. I will talk to you soon.

