

LIMITLESS 2024

GETTING STARTED GUIDE

Get Ready to Crush Your Climb

Limitless

lim·it·less' *adjective*

without end, limit, or boundary.





LIMITLESS LIFESTYLE

Build a wildly successful \$1M practice and a life that you love.

THE LIMITLESS ETHOS

We believe that there's a science to success; that it's not about doing *more* but thinking *better*.

With our [mindset + methods] approach, we'll help you accelerate your growth and achieve greater success – *while having the time and freedom to enjoy it.*

Over the course of the year, we'll challenge you with an extensive practice curriculum while consistently coaching you around a more personal one.

AS YOU GET STARTED...

You're here to eliminate the background noise, elevate your thinking, and radically accelerate your success by tapping into game-changing shifts that help you grow your revenue, deliver deeper value and take more time off.

You'll learn the best practices proven to work in some of the best and brightest firms in the country, making it easier to create greater success in yours.

And you'll find a place where you'll be continuously challenged to get clear, get focused and get to work in ways that deliver the results that matter most to you.

THIS YEAR WE'LL HELP YOU LEARN TO:

- Build a more confident mindset
- Set your vision and goals, with a go-forward plan
- Show up as a confident, well-equipped leader
- Leverage your time and talent
- Attract the right clients at the right fees
- Deliver trusted advice and deep value to clients
- Run a hyper-efficient practice
- Drive steady growth
- Reclaim your time

READY TO GET STARTED?

Read on for your 2024 Action Items.





STEP 1: READ THIS GUIDE

This Getting Started Guide gives you helpful information to prepare for and make the most of your year of Limitless Advisor Coaching.



STEP 2: EMBARK ON YOUR BASE CAMP LEARNING PATH

You'll receive a link to embark on your first learning path soon. Watch the pre-work lessons and complete the related exercises in preparation for our Performance Virtual Summit on January 16.



STEP 3: WATCH FOR YOUR WELCOME KIT

Look for a package that will include your Limitless 2024 wall calendar and a few other goodies to fuel you for your 2024 climb. Commit to putting them to use!

STEP 4: SCHEDULE YOUR 2024 NOW

Please see the call calendar in this guide to ensure all calls and events are blocked on both your schedule and calendars. Take charge of your year by setting out your schedule to align with your goals. Your 'model schedule' will look like this:

- Be CEO and manage on Mondays, then "run the shop" Tuesday-Thursday and grow or get out of the office on Fridays.
- Spend Fridays working on the practice in ways that improve and/or grow it, or take them off. Do not run the shop on Fridays! This is a dreadful habit you must avoid at all costs.
- Schedule at least 4 weeks out of the office. They don't have to be concurrent, but put them on the calendar! If you're focused on growing cash flow over time away, schedule four "growth weeks" for dedicated time to make progress. These may seem like huge steps now, but you will learn how to build and grow your practice in far less time.

STEP 6: TAKE YOUR PRACTICE DIAGNOSTIC

You'll receive access to your Practice Diagnostic during our Kick-off call on January 8th. It will help you identify the shifts you need to focus on this year and enable you to create your personalized coaching roadmap.



YOUR COACHING CENTER

Refer to your Lifestyle 2024 call calendar for specific dates and times. Your group coaching calls are already noted for you on your 2024 Wall Calendar.



WEEK 1

PEAK PRACTICE Group Coaching Call

Join us for our Peak Practice Call the first week of each month, focused on Limitless principles and best practices. These 90-minute calls deliver valuable insights, practical content, in-practice examples, and a generous allowance of time for your questions and coaching.

WEEK 2

PEAK PRACTICE Office Hours

Discuss expanded topics and get your specific questions answered live during this 60-minute call with our practice coaches and your Limitless peers.

WEEK 3

PERSONAL PEAK Group Coaching Call

Our mindset coaches provide focused insights on how to successfully apply Limitless learning, discuss expanded topics, dive into mindset road blocks, and show up ready to answer your implementation questions.

WEEK 4

COACH ADAM Cohort (optional)

Coach Adam's monthly small group coaching call offers practical insights and support applying what you learn (add-on). Cohort members may also schedule optional 20-minute 1:1 coaching check-ins with Coach Adam as needed to work through specific questions.

ONGOING

1:1 QUARTERLY Coach Support (optional)

A 1:1 coaching package add-on gives you personalized check-ins with your choice of a practice or mindset coach each quarter to support you on an individual level.

GOOD VIBES Tribe

Covering topics from time management to tech stacks, our community is a common place to connect, collaborate and get advice and feedback from your peers and coaches.

LIMITLESS Lifestyle 2024

COACHING CALLS & EVENTS CALENDAR

JAN FEB MAR APR MAY JUNE JULY AUG SEPT OCT NOV DEC

Limitless Calls

PEAK PRACTICE COACHING CALL
9:00-10:30 AM PT
(Lifestyle & Leaders)

N/A
New Year's Day

2/5

3/4

4/1

5/6

6/3
Productivity Summit

7/1

8/5

N/A
Labor Day

10/7

11/4

12/2

PEAK PRACTICE OFFICE HOURS
9:00-10:00 AM PT
(Lifestyle & Leaders)

1/8
Kick-Off Calls
(Call Times TBA)

2/12

3/11
Value Summit

4/8

5/13

6/10

7/8

8/12

9/9

10/15
Tuesday after
Columbus Day

11/12
Tuesday after
Veterans Day

12/9
Program
Wrap-Up

PERSONAL PEAK COACHING CALL
9:00-10:30 AM PT
(Lifestyle & Leaders)

N/A
Martin Luther
King Jr. Day

2/20
Tuesday after
President's Day

3/18

4/15

5/20

6/17

7/15

8/19

9/16

10/21

11/18

COACHING COHORT
9:00-10:30 AM PT
(Cohort Members Only)

1/22

2/26

3/25

4/22

5/28
Tuesday after
Memorial Day

6/24

7/22

8/26

9/23

10/28

11/25

Limitless Events



1/16
Performance
Summit



3/11
Value
Summit



6/3
Productivity
Summit



9/3
Growth
Summit

RETREAT WORKSHOPS

3/20 - 3/21
Value Retreat
Workshop

9/11 - 9/12
Growth Retreat
Workshop



LIMITLESS

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*There are no calls on 5th Mondays

LIMITLESS Lifestyle Summits & Retreat Workshops

Lifestyle Summits and Retreat Workshops bring best practices, deep insights, practical learning, and peer collaboration together in virtual and in-person experiences that foster a deep sense of community.

Every advisor in Limitless made a deliberate decision to join with the goal of experiencing a bigger, better future. At Limitless events, this community of growth-minded advisors comes together to connect and collaborate in ways that expand us professionally and personally.

VIRTUAL SUMMITS

This year, we will hold four (4) full-day virtual summits, which are planned for January, March, June and September. In addition, we also have two 1.5-day in-person Retreat Workshops slated for March (in Charlotte, NC) and September (in Denver, CO).

Virtual summits are designed to deliver Limitless learning lessons and create space to learn from practicing advisors who have “been there, done that.” You’ll be able to select from either “beginner trailhead” or “advanced climb” lessons, tailored to meet you where you are on your roadmap to a practice (and life!) you love.



TAYLOR
Schulte,
Define Financial

“Thanks again for an awesome retreat. I’m fired up to double my practice and get to \$100mil in AUM in 12 months. And I’ve never put so many things into action immediately after a conference. My wife is wondering what you guys did to me.”

“This (virtual) Marketing Retreat was the best ever.”



TIFFANY Charles,
Destiny Capital

RETREAT WORKSHOPS

With our new Lifestyle and Lifestyle Bundle options available, members are able to choose the program that most suits their individual preferences for gathering.

Our acclaimed Live Retreat Workshops will synthesize your Limitless learning, with 3-hour, action-oriented sessions that are all about rolling up your sleeves to do the work. Stephanie and advisor coaches lead these intimate group workshops, and are

on site to provide specialized feedback and advice to solve your sticking points. This is where the rubber meets the road.

Throughout our time together, we’ll feed your brain with frequent breaks and allow ample chance to engage and coach you through a curriculum that keeps you coming back for more. Refreshments will be available throughout the day to help keep your energy up. Dinner is on your own and members often join together in the evenings.



LEADERS Events

If you are a Leader firm, you and your team have the option to participate in Lifestyle virtual summits. As a Leader, you and a guest have the opportunity to attend Lifestyle events live.

LIMITLESS Lessons

Lifestyle gives you deep insights, business expertise, in-depth coaching, and comprehensive resources, together with personal coaching and accountability.

Our course lessons provide the education, training and tools you need to build a successful practice through these success climbs:



ELEVATE YOUR THINKING



DESIGN YOUR MODEL PRACTICE



TAKE CHARGE OF YOUR TIME



BE CLIENTS' TRUSTED ADVISOR



DEFINE & PACKAGE YOUR VALUE



COMMUNICATE YOUR VALUE WITH CONFIDENCE



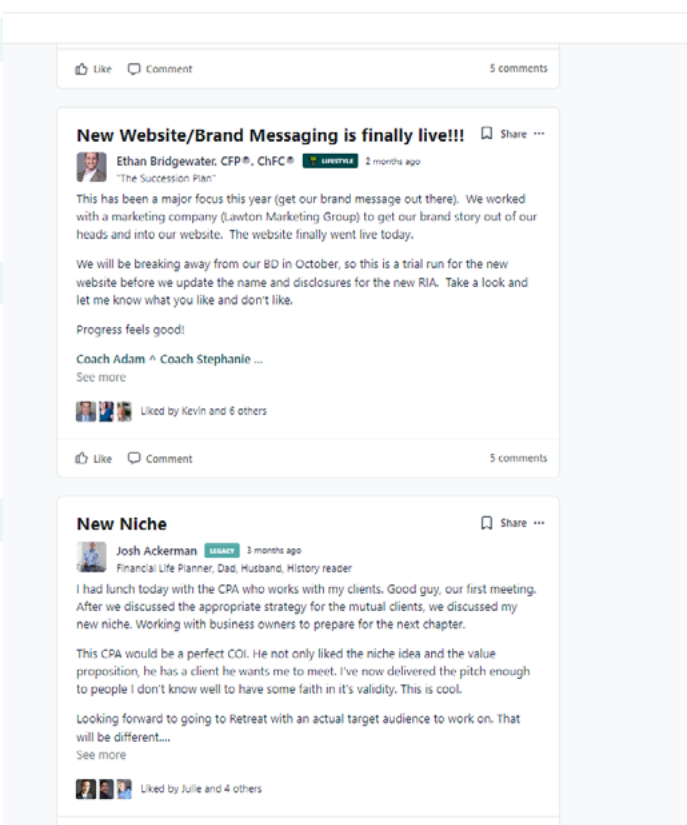
STAFF FOR SUCCESS



SYSTEMATIZE & SPECIALIZE SYSTEMS



FIND YOUR GROWTH GROOVE



LIMITLESS Library

Library will be your go-to resource throughout coaching. The Learning Library is a comprehensive suite of practice-building resources that include training videos, instructional content and a robust library of downloadable samples, scripts, templates, tools and checklists. This set of resources offers the best practices, strategies, and practical tools to help you move from idea to implementation for each lesson, and much more.

ADDITIONAL COACHING OPPORTUNITIES

KICKING OFF YOUR COACHING COHORT

(FOR COHORT ADD-ON MEMBERS ONLY)

Join Coach Adam as he pulls back the curtain on his practice. This 90-minute monthly small group call (held on the 4th Monday of each month) offers a chance to see how he has applied the Limitless principles...while achieving 4x growth! You'll benefit from the opportunity to schedule 1:1 calls with Adam throughout the year (he'll hold space every Monday for quick, personalized conversations). You'll also participate in a private Tribe space reserved for Cohort members, where Adam will share videos, prework for calls and helpful action items to implement Limitless best-practices.



Want to join Adam's Cohort?
It's not too late! Let us know by emailing coaching@limitlessfa.life

PERSONAL 1:1 COACHING PACKAGE

(FOR COACHING PASS ADD-ON MEMBERS ONLY)

Take your Limitless to the next level with personalized 1:1 coach calls. You will receive:

- (4) 50-minute quarterly calls with the executive or practice coach of your choice. Stephanie, along with Practice Coach Natalie and Mindset Coach Liz are ready to help you create a personalized strategy and break through any individual barriers.
- Additional follow-up touchpoints from the coaches offer personalized guidance and radical accountability.



Want to add a personal coaching package?
You can do so at any time throughout the year. Let us know by emailing coaching@limitlessfa.life

2024 Faculty



FACULTY LEADER
Stephanie Bogan
Limitless Advisor



ADVISOR COACH
Adam Cmejla
Integrated Planning



GUEST FACULTY
Michael Kitces
Kitces.com



PRACTICE COACH
Natalie Bergsma
BeyondFA



MINDSET COACH
Liz Hand
Pleasant Wealth



ADVISOR COACH
Tiffany Charles
Destiny Capital



ADVISOR COACH
Jarrod Musick
Destiny Capital

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Be Limitless READ AHEAD LIST

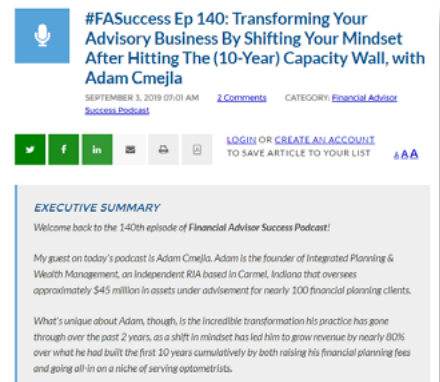
Want to get a head start? You can read these four books and listen to these three podcasts to jump start your efforts and prepare to make the most of Limitless lessons.



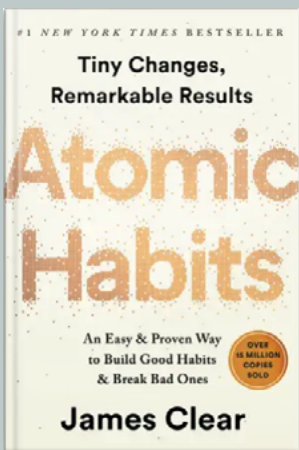
How Mindset Drives Success and the 7 Freedoms of Limitless Advisors with Stephanie Bogan



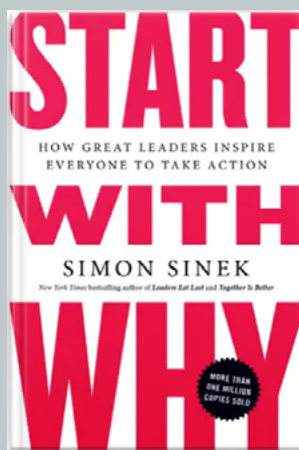
The 7 Pillars of Running an Advisory Firm Like a Business, with Stephanie Bogan



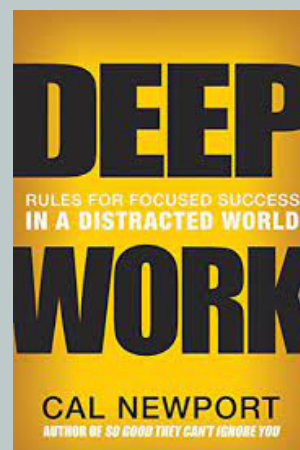
Transforming Your Advisory Business by Shifting Your Mindset After Hitting the Capacity Wall, with Adam Cmejla



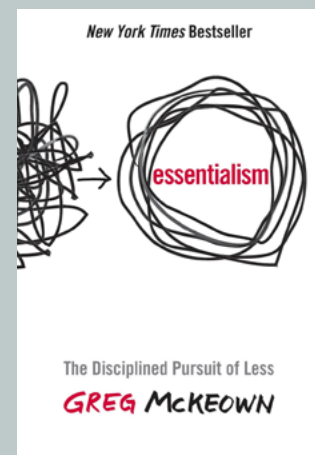
Atomic Habits: An Easy & Proven Way to Build Good Habits & Break Bad Ones, by James Clear



Start With Why: How Great Leaders Inspire Everyone to Take Action, by Simon Sinek



Deep Work: Rules for Focused Success in a Distracted World, by Cal Newport



Essentialism: The Disciplined Pursuit of Less, by Greg McKeown

LISTEN

READ

S
S
E
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M
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GET READY

to get the tongue
in your mouth
and the tongue
in your shoes

MOVING IN
THE SAME
DIRECTION

