



Adam Cmejla



Natalie Bergsma



Liz Hand

A group of soccer players in black jerseys and white shorts celebrating on a grass field. One player is holding a soccer ball, and another is being embraced. The background features large, stylized teal concentric circles.

HIGH-PERFORMANCE HAPPINESS

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High-Performance Happiness

● /hī/ /pər 'fôrməns/ / 'hapēnəs/

The state in which you feel highly productive and consistently experience high levels of performance and success, and also experience a deep sense of well-being, satisfaction, and fulfillment in your work and life.



Well-being: You experience a positive mindset, a sense of well-being, and a life-affirming life-work balance



Performance: You* demonstrate high levels of performance and success and consistently meet or exceed your business and personal goals.



Work Satisfaction: You are engaged and motivated in your role, consistently make a positive contribution to your firm, and find purpose and joy in your work.



Health & Vitality: You are in good health and have the energy, vitality, and fitness level to support your best life.



Continued Growth: You know high-performance happiness is more than a short-term achievement - it's your model for living, a sustainable system for optimizing your work, wealth, and well-being.

* You (and your team) is appropriate for those who want to build "happy, high-performing teams"

BUILDING YOUR HIGH- PERFORMANCE HAPPINESS, A STEP-BY- STEP PROCESS



Step 1:
Clarify what you really want

Get clear and specific
No fear / No Judgment



Step 2:
Take an honest inventory

Practice extreme ownership
What is helping you, what is holding you back?
What needs to change?
What is standing in your way?



Step 3:
Do a time inventory

Where is your time really going?
Where do you need to spend your time/energy?
What needs to happen for that to occur?
What's standing in your way?



Step 4:
Build aligned habit systems

Personal 'Routines & Rituals' (e.g., morning practice)
Business models and systems (e.g., time systems, service models)



Step 5:
Take action with Accountability

Develop action plans
Set up accountability system (Success Shifter, Friday Check Ins, Accountability Buddy)



Step 6:
Live it daily

You live what you value
Develop your Personal Success System
Start small, get some Wins!, build from there
Unleash your kick-assery

CONSISTENCY COMPOUNDS

the true cost of conditioned thinking



A "few" fee exceptions



\$80,000/
year



\$1.6M over
20 years

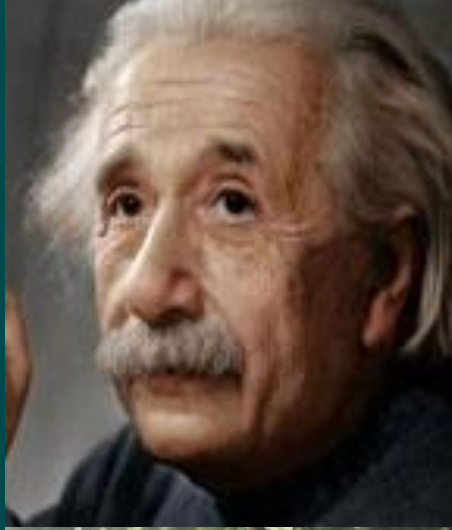


\$2.36M @ 7%



ROI
COST OVER
TIME AND
REALIZED
VALUE LOSS
UPON SALE

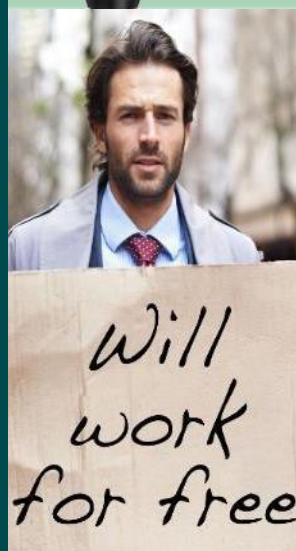
THOUGHT HABITS



BEHAVIOR HABITS



BUSINESS HABITS



IN PRACTICE: JED'S LIMITLESS LIFEBOOK

My Big Why

TO SIMPLIFY MY PRACTICE THROUGH INSANELY SIMPLE AND EFFECTIVE PROCESSES SO THAT I CAN CREATE TIME, OPPORTUNITIES, AND GREAT EXPERIENCES FOR MYSELF AND THE PEOPLE IN MY LIFE.



MORNING ROUTINE

| | |
|---------|--|
| 5:30 AM | DAILY STOIC READING, 20 MINUTES MEDITATION |
| 6:00 AM | EXERCISE |
| 7:00 AM | COFFEE + BREAKFAST |
| 7:30 AM | WORKSHEET WITH KIDS |
| 8:00 AM | SHOWER + DRESS |

TOP 3 PRIORITIES FOR THE YEAR



IMPLEMENT SURGE MEETINGS



DEFINE WHO WE SERVE BEST & A SERVICE MODEL FOR DOING SO



START USING 1-PAGE PLANS

| Current (YE 2021) | 1-Year Goal (YE 2022) | 3-Year Goal (YE 2024) | What Will It Take? |
|---|---|---|--|
| \$627,000 (+\$250,000 Other Revenue) \$886,000 | \$685,000 (+\$250,000 Other Revenue) \$935,000 | \$750,000 (+\$250,000 Total Revenue) \$1,000,000 | Sell off-profile clients Sell (most) clients being serviced by other advisors -Develop & Focus on a niche |
| \$70,000,000 | \$70,000,000 | \$80,000,000 | -Grow Jed's client base with ideal clients -Have other work off-niche clients (or sell) |
| \$1,549 (\$627,000/405) | \$2,740 (\$685,000/250) | \$3,000 (\$750,000/250) | -Trim unprofitable clients -Nuture and duplicate TI's -Max of 100 'other' clients |
| 70 (Summer Friday's & Ski Bees) | 20 | 80 | -Surge Meetings -Refine/Define Service Model -Clear processes that team uses and understands |
| 40+ | 36 | 32 | As above |
| 60 (Total 600) | 60 (Total 350) | 80 (Total 250) | -Wow service model -Deliver massive value client meetings (and in between) -1-page plan/Planning First -Referrals: Our client experience IS our marketing! -Develop a marketing plan |



YOUR [HAPPINESS] COACHING TEAM



Adam Cmejla

Leveraging Routines &
Rituals



Liz Hand

Leveraging Affirmations
& Visualizations



Natalie Bergsma

Leveraging Time &
People



THE IMPORTANCE OF JOURNALING



FREE TIME

- "Protect the asset."
- Plan your time off first and track it (either on a paper calendar or in some other journal.)
- What gets measured gets managed.

EXERCISE & GOOD IDEAS

The physiological benefits of exercise also provide a mental boost.

- Action item: have either an app or "Hey Siri, make a note to remind me of XYZ idea in one hour" so that it doesn't get lost.
Just because we have great ideas doesn't mean we retain them when we're working out.
- Implementing a task/project management system like GTD is paramount
- The mind is a wonderful processor, but a horrible memory bank; it doesn't hold ideas well.
- Need a Someday/Maybe folder for ideas that you consistently revisit on a weekly/monthly/quarterly review cycle.



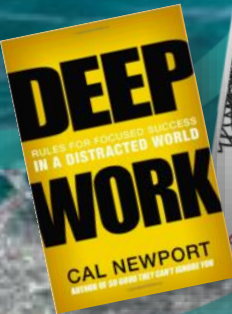
ACCOUNTABILITY OF JOURNALING

GET A BUDDY, GROUP OR COACH TO
HOLD YOU ACCOUNTABLE

YOU DON'T HAVE A
TIME PROBLEM

YOU HAVE A
PRIORITY PROBLEM

DO EPIC SH*T



A woman with long dark hair is riding a stationary bike in a gym. She is wearing a white tank top and dark leggings. The scene is brightly lit, likely from a large window in the background. The entire image has a teal color overlay. Large, teal, sans-serif text is centered over the image, reading "WHERE IS ALL YOUR TIME REALLY GOING?".

WHERE IS
ALL YOUR TIME
REALLY GOING?



STOP WASTING TIME

FOCUS ON ENERGY-CREATING, REVENUE-PRODUCING ACTIVITIES

No interruptions. No distractions. No \$50 hour work!

1 ANNUAL CALENDAR



2 MODEL SCHEDULE

Weekly Advisor Schedule: No Client Meetings SAMPLE:

| MONDAY | TUESDAY | WEDNESDAY | THURSDAY | FRIDAY |
|----------------|----------------|----------------|----------------|----------------|
| 7:00-7:30 AM | 7:00-7:30 AM | 7:00-7:30 AM | 7:00-7:30 AM | 7:00-7:30 AM |
| 7:30-8:00 AM | 7:30-8:00 AM | 7:30-8:00 AM | 7:30-8:00 AM | 7:30-8:00 AM |
| 8:00-8:30 AM | 8:00-8:30 AM | 8:00-8:30 AM | 8:00-8:30 AM | 8:00-8:30 AM |
| 8:30-9:00 AM | 8:30-9:00 AM | 8:30-9:00 AM | 8:30-9:00 AM | 8:30-9:00 AM |
| 9:00-9:30 AM | 9:00-9:30 AM | 9:00-9:30 AM | 9:00-9:30 AM | 9:00-9:30 AM |
| 9:30-10:00 AM | 9:30-10:00 AM | 9:30-10:00 AM | 9:30-10:00 AM | 9:30-10:00 AM |
| 10:00-10:30 AM | 10:00-10:30 AM | 10:00-10:30 AM | 10:00-10:30 AM | 10:00-10:30 AM |
| 10:30-11:00 AM | 10:30-11:00 AM | 10:30-11:00 AM | 10:30-11:00 AM | 10:30-11:00 AM |
| 11:00-11:30 AM | 11:00-11:30 AM | 11:00-11:30 AM | 11:00-11:30 AM | 11:00-11:30 AM |
| 11:30-12:00 PM | 11:30-12:00 PM | 11:30-12:00 PM | 11:30-12:00 PM | 11:30-12:00 PM |
| 12:00-12:30 PM | 12:00-12:30 PM | 12:00-12:30 PM | 12:00-12:30 PM | 12:00-12:30 PM |
| 12:30-1:00 PM | 12:30-1:00 PM | 12:30-1:00 PM | 12:30-1:00 PM | 12:30-1:00 PM |
| 1:00-1:30 PM | 1:00-1:30 PM | 1:00-1:30 PM | 1:00-1:30 PM | 1:00-1:30 PM |
| 1:30-2:00 PM | 1:30-2:00 PM | 1:30-2:00 PM | 1:30-2:00 PM | 1:30-2:00 PM |
| 2:00-2:30 PM | 2:00-2:30 PM | 2:00-2:30 PM | 2:00-2:30 PM | 2:00-2:30 PM |
| 2:30-3:00 PM | 2:30-3:00 PM | 2:30-3:00 PM | 2:30-3:00 PM | 2:30-3:00 PM |
| 3:00-3:30 PM | 3:00-3:30 PM | 3:00-3:30 PM | 3:00-3:30 PM | 3:00-3:30 PM |
| 3:30-4:00 PM | 3:30-4:00 PM | 3:30-4:00 PM | 3:30-4:00 PM | 3:30-4:00 PM |
| 4:00-4:30 PM | 4:00-4:30 PM | 4:00-4:30 PM | 4:00-4:30 PM | 4:00-4:30 PM |
| 4:30-5:00 PM | 4:30-5:00 PM | 4:30-5:00 PM | 4:30-5:00 PM | 4:30-5:00 PM |
| 5:00-5:30 PM | 5:00-5:30 PM | 5:00-5:30 PM | 5:00-5:30 PM | 5:00-5:30 PM |
| 5:30-6:00 PM | 5:30-6:00 PM | 5:30-6:00 PM | 5:30-6:00 PM | 5:30-6:00 PM |
| 6:00-6:30 PM | 6:00-6:30 PM | 6:00-6:30 PM | 6:00-6:30 PM | 6:00-6:30 PM |
| 6:30-7:00 PM | 6:30-7:00 PM | 6:30-7:00 PM | 6:30-7:00 PM | 6:30-7:00 PM |
| 7:00-7:30 PM | 7:00-7:30 PM | 7:00-7:30 PM | 7:00-7:30 PM | 7:00-7:30 PM |

3 CLIENT MEETING SURGES



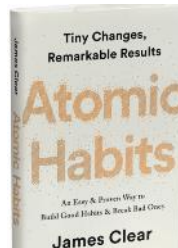
3 MEETS A DAY | 4 MEETS A DAY | 5 MEETS A DAY

| | | |
|---|--|--|
| 3 meets day 3 days week = 9 meets week / 160 meets = 18 weeks | 4 meets day 3 days week = 12 meets week / 160 meets = 14 weeks | 5 meets day 3 days week = 15 meets week / 160 meets = 11 weeks |
|---|--|--|

2, 9-week surge sessions in April/May and Oct/Nov | 2, 7-week surge sessions in April/May and Oct/Nov | 2, 5.5-week surge sessions in April/May and Oct/Nov



4 DAILY ROUTINE



Success Shifter

| DATE | PROFESSIONAL GOALS | PERSONAL GOALS | WELLNESS GOALS | FINANCIAL GOALS |
|-----------|--------------------|----------------|----------------|-----------------|
| 1/1/2020 | | | | |
| 1/2/2020 | | | | |
| 1/3/2020 | | | | |
| 1/4/2020 | | | | |
| 1/5/2020 | | | | |
| 1/6/2020 | | | | |
| 1/7/2020 | | | | |
| 1/8/2020 | | | | |
| 1/9/2020 | | | | |
| 1/10/2020 | | | | |
| 1/11/2020 | | | | |
| 1/12/2020 | | | | |
| 1/13/2020 | | | | |
| 1/14/2020 | | | | |
| 1/15/2020 | | | | |
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| 1/24/2020 | | | | |
| 1/25/2020 | | | | |
| 1/26/2020 | | | | |
| 1/27/2020 | | | | |
| 1/28/2020 | | | | |
| 1/29/2020 | | | | |
| 1/30/2020 | | | | |
| 1/31/2020 | | | | |

LIMITLESS

LEVERAGING TIME



Align Your Time and Energy

ENERGY PRODUCING & REVENUE CREATING

ABOVE THE LINE
BELOW THE LINE

ENERGY DRAINING & REVENUE DEPLETING

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The form is a worksheet for tracking time and energy. It has a title 'Align Your Time and Energy' in a teal font. Below the title is a green header section for 'ENERGY PRODUCING & REVENUE CREATING' with a green progress bar icon. This section contains several horizontal lines for notes. A horizontal line separates this from the bottom section, with the text 'ABOVE THE LINE' above it and 'BELOW THE LINE' below it. The bottom section is for 'ENERGY DRAINING & REVENUE DEPLETING' with an orange progress bar icon and several horizontal lines. At the bottom left is the 'LIMITLESS' logo, and at the bottom right is a small copyright notice.

WHAT IS ENERGY-CREATING?



WHAT IS ENERGY-DRAINING?



WHERE DO YOU WANT TO INVEST YOUR TIME & TO WHAT EFFECT?



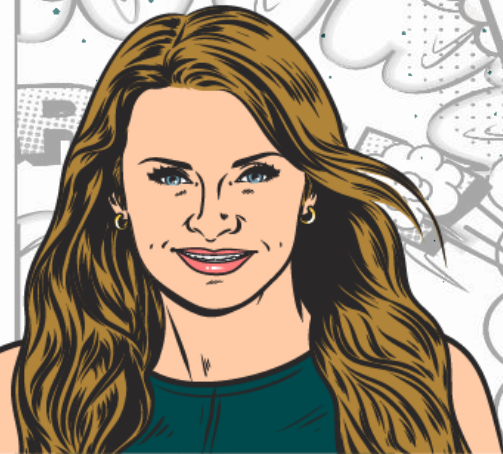
DO:
ENERGY-CREATING
REVENUE PRODUCING
ACTIVITIES

DON'T:
DO ANYTHING ELSE



Who are the voices you are
listening to right now?

What do you need to
eliminate?



\$1 MM practice
60%+ EBOC
30 hr work week
Fridays Off
8 weeks OOO
100 ideal clients

Create a Cue

VISUAL



AUDITORY

AUDITORY
DIGITAL

CONSISTENCY IS KEY

KINISTHENIC



Leveraging
Routines & Rituals



Leveraging
Affirmations
& Visualizations










Leveraging
Time & People

LET'S BREAKOUT!



Next Steps

-  **Clarify Vision & Big Why:** Define your version of high-performance happiness & what it will take
-  **Time Inventory:** Take a time inventory; apply Limitless time systems to take agency over your time
-  **The Line Exercise:** Complete the “above/below the line” energy and activity exercise
-  **Success Shifter:** Use your Success Shifter to make/break habits that support your success
-  **Routines & Rituals:** develop rituals and routines to reinforce and deepen success habits & skills
-  **Limitless Life book:** Use the template and Jed's sample to keep yourself clear and focused
-  **Create Accountability:** Practice Extreme Ownership; do Friday check-ins; find a buddy or coach

Be sure to attend the Breakthrough Series!