

LIMITLESS 2024

LEADERS' GETTING STARTED GUIDE

Get Ready to Crush Your Climb



WELCOME!



...to a mindset-shifting, goal-crushing coaching program designed to help successful advisory firm owners to shift their success into an even higher gear.

Designed for Founders and Leaders of 7-figure firms who are serious about scaling their success without sacrificing their lives, Leaders blends the best of elite Masterminds, expert business consulting and executive coaching into one game-changing experience designed to help owners elevate their work, wealth and well-being.

Leaders coaching will disrupt your thinking, challenge your status quo and offer a proven path to optimize your performance, grow your profits, and address your biggest hurdles - all while gaining back your time and freedom.

You'll connect and collaborate with Stephanie, other successful leaders who've walked your path and outside experts armed with the expertise and know-how to help you create new levels of success.

Let's Crush Your Climb!

AS YOU GET STARTED...

This isn't your average coaching program. We're here to disrupt you. Our coaching is designed to challenge your conditioned thinking and call out ineffective tactics. We'll help you elevate your thinking, behavior and business practices so you can create the 'more and better' you came for.

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
- Take agency over 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 on the next page to ensure all Limitless calls and events are blocked on both your print and digital 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.



PROGRAM PARTICIPATION

- **PRIMARY MEMBER:** You are enrolled in the Limitless Leaders program, which means you also have access to the Lifestyle program, including attendance at Lifestyle Retreat Workshops for you and a guest.
- **TEAM MEMBERS:** During online enrollment, we'll invite you to designate up to three (3) team members for free participation in the Lifestyle program, including monthly Lifestyle calls and Virtual Summits.
- **CO-MEMBERS:** You'll have the option to add any advisors you'd like to designate as Co-Members to join you in the program and at in-person Leaders Retreats. There is an additional cost for Co-Members; they will receive full participation in the Lifestyle program, as well as an invitation to Leaders monthly Peak Practice Coaching Calls, Leaders Cohort, Lifestyle Retreat Workshops (2 a year), and Leaders Retreats (3 a year). Please note that your partners and/or stakeholders are welcome to participate in your private firm calls, without becoming a Co-Member.
- **YOUR PLAN:** We'll discuss the appropriate level of participation for Leaders firms (and how to make the most of it) in our January 8 Kick-Off call, as well as in your first Strategy and Consulting session with Stephanie. If you have any questions about who should be a Co-member versus a designated team member or just a participant on your calls, please connect with our team and we'll help you figure out what makes the most sense for your situation.



YOUR COACHING CENTER

Refer to your Leaders 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 during this 60-minute call with our practice coaches and your Lifestyle and Leaders 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

LEADERS COHORT/OFFICE HOURS Group

Our 90-minute monthly Leaders think tank call offers practical insights and peer support applying what you learn. Work through specific questions, share real-time implementation of Limitless principles, and hold one another accountable to keep moving forward.

ONGOING

PERSONAL PRACTICE/MINDSET Coaching

You may schedule up to six (6) one-on-one coaching sessions with either our practice or executive coach during the year, whichever you choose at the time to accelerate your success.

CONSULTING Sessions with Stephanie

During the spring, get clarity and design your strategy with Stephanie for the year. At your mid-year check-in, integrate your Leaders Everest Experience learning into your practice. For your fall session, fine-tune your vision, strategy and priorities for the coming year.

LIMITLESS Leaders 2024

COACHING CALLS & EVENTS CALENDAR

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

Limitless Calls

LEADERS PEAK PRACTICE CALL 11:00 AM-12:30 PM PT (Leaders & Co-Members Only)	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	
LEADERS COHORT/ OFFICE HOURS 11:00 AM-12:30 PM PT (Leaders & Co-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

VIRTUAL SUMMITS	 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
LEADERS RETREATS		3/21 - 3/22 Spring Leaders Retreat		5/22 - 5/24 Leaders Everest Event	9/12 - 9/13 Fall Leaders Retreat

*There are no calls on 5th Mondays

LIMITLESS Event Information

Ready to gather with your Limitless tribe? We take our events seriously, with the goal of providing content to meet you where you are along with experiences that encourage collaboration and support from your peers. More about our events here:

VIRTUAL SUMMITS

- Lifestyle holds four (4) Virtual Summits per year in January, March, June and September. Attendance at these Summits is included for you and your entire team.
- You and/or your designated team members should attend the January 16 Performance Virtual Summit as we cover business planning and personal productivity. This is where we create clarity and accountability at the firm and individual level.

IN-PERSON RETREAT WORKSHOPS

- Lifestyle holds two (2) live Retreat Workshops, in March and September. In addition to attending Leaders Retreats, you have the option of attending Lifestyle Retreats or sending a designated team member.
- If your team member attends a live Retreat Workshop with you, they may come as your free guest. If they are a Co-Member, their attendance at Retreat Workshops is included in their membership.

LEADERS RETREATS

- Leaders holds three (3) Retreats per year, in March, May and September. March and September are adjacent to Lifestyle Retreats to allow you and our team to participate to the greatest extent possible, as appropriate for your situation. Your Co-Member(s) may attend Leaders Retreats with you.
- The May Leaders Everest Experience Retreat is an in-depth, 2.5-day experience centered around communal sharing, impactful speakers, and time for personal coaching. You will stretch, you will grow, you will collaborate deeply, you will get newfound clarity - and you will have fun!





YOUR Next Steps

We've covered a lot of ground, so please make note of these important actions as we head into the new year:

- When you receive your Getting Started email, please complete the enrollment quickly so we can get you set up for the year ahead.
- Use the calendar links on the Getting Started page to sync to your online calendars.
- Take your Leaders Questionnaire (coming via email) in order to let us know what will be most impactful for you this year.
- Be on the lookout for an email from me to schedule your first Strategy Consulting Call.

As you have questions or need support throughout the year, you are always welcome to reach out to leaders@limitlessfa.life, and we will personally assist you with any needs, questions or issues as we work together this year.

With that, welcome to Leaders 2024.

Let's do this!

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