



# SCIENCE OF SUCCESS

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UNCOMFORTABLY  
*Comfortable*



LIMITLESS

ENVIRONMENT



SKILL



MINDSET



LIMITLESS

80%

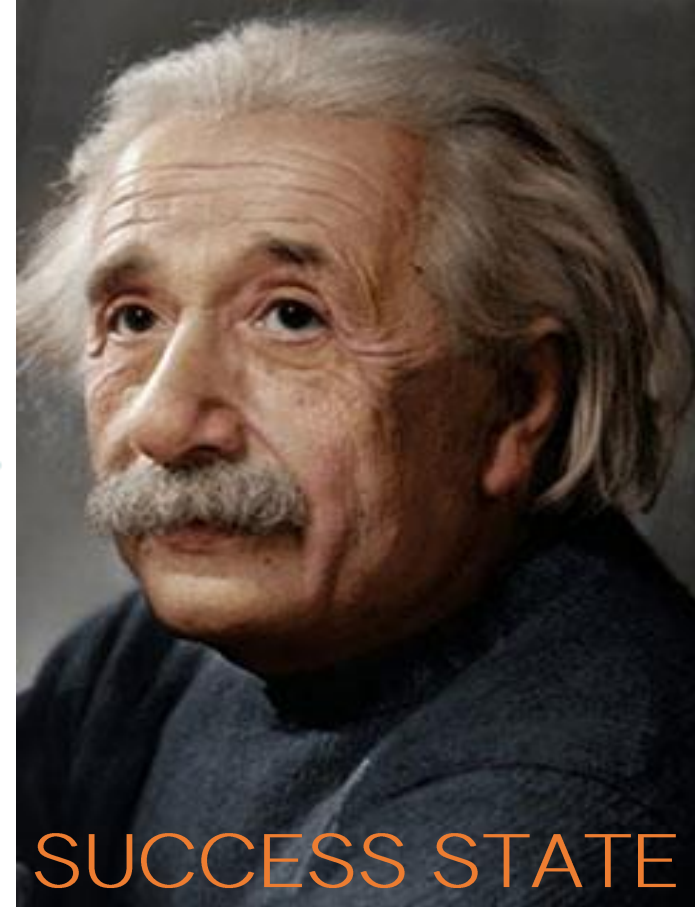


SURVIVAL STATE

LIMITLESS

# ONE BRAIN TWO MINDS

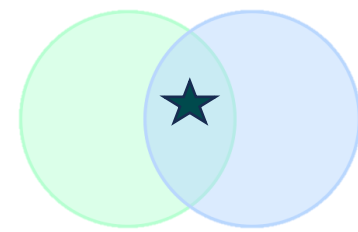
PAST ----- FUTURE



SUCCESS STATE

## SUBCONSCIOUS

- Programmed by the past
- Instinctual, habit mind
- Hard-wired for survival
- Powered by emotion



## CONSCIOUS

- Lives in the present
- Present, future-focused
- Reasoning, logical mind
- Powered by reason

# OUR *operating system* MOST OF THE TIME

We have an average of 60,000 thoughts a day

80% of them are negative

We process 11 million bps info per second

Only 40 bps are processed by the conscious mind

Our brains focus on negative inputs

By a factor of 7 to 1

We spend an avg. of 70%+ of our days "stressed"

Exist in a perpetual state of 'fight or flight'

When we're stressed, we default to auto-pilot

Governed by our belief systems & conditioned behaviors

By age 35,  
we're 95% a hard-wired set  
of pre-programmed behaviors



ALEX HONNOLD  
FREE SOLO CLIMBER

# BELIEF SYSTEMS

1

PRE-CONCEIVED MENTAL MODELS

2

INTERNAL PROCESS OCCURS COMPLETELY OUTSIDE  
OUR AWARENESS

3

WE ARE MEANING-MAKING MACHINES  
Events have no meanings except the ones you give them

4

IN 1/5 SECOND BELIEFS DRIVE CONDITIONED  
REACTIONS  
versus conscious responses

5

YOUR STORIES SHAPE YOUR SUCCESS  
empowering or disempowering

CREATURES OF  
CONDITIONED THINKING



# BELIEFS

- Some beliefs help, some beliefs hinder
- You can move beyond auto-pilot
- Have to “interrupt” these habit loops
- Willpower is garbage
- Answer is awareness followed by action
- Upgrade your beliefs, upgrade your results





I'm going to  
be eaten by a  
HUNGRY  
LION  
AND DIE!?!

common

# LIMITING BELIEFS

1

MISTAKES  
ARE BAD,  
MAKE ME BAD.

2

I HAVE TO BE  
\_\_\_\_\_,  
TO BE \_\_\_\_\_.

3

I'M NOT  
WORTHY /DON'T  
DESERVE \_\_\_\_.

4

I AM NOT  
IMPORTANT  
OR LOVED.

5

I AM NOT  
ENOUGH.

1

I CAN'T CHARGE  
(MORE) FOR  
PLANNING.

2

I CAN'T  
FOCUS ON  
A NICHE.

3

IF I DO 'THAT' MY  
CLIENTS & COIs  
WILL REVOLT.

4

ALL CLIENTS  
ARE GOOD  
CLIENTS.

5

I'M JUST  
AN  
IMPOSTER.

LIMITLESS

# AWARENESS BUILDING

①

MISTAKES ARE BAD, MAKE ME BAD.

②

I HAVE TO BE \_\_\_\_\_ TO BE \_\_\_\_\_.

③

I'M NOT WORTHY OF/DON'T DESERVE

④

I AM NOT IMPORTANT OR LOVED.

⑤

I AM NOT ENOUGH.

①

I CAN'T CHARGE (MORE) FOR PLANNING.

②

I CAN'T FOCUS ON A NICHE, I CAN'T...

③

IF I DO THAT OR CHARGE THAT, MY CLIENTS AND COI'S WILL REVOLT

④

ALL CLIENTS ARE GOOD CLIENTS, YES IS THE ONLY WAY TO WIN

⑤

I'M AN IMPOSTER, THEY'RE GOING TO FIND OUT

IDENTIFY A LIMITING BELIEF THAT'S SLOWING DOWN YOUR SUCCESS

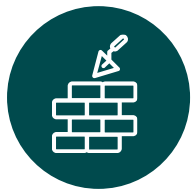
WHAT'S YOUR FIRST MEMORY OF FEELING THIS WAY

SHARE ONE WAY THIS LIMITING BELIEF HAS NEGATIVELY IMPACTED YOUR PRACTICE, AND HOW





# IT'S A STATE OF BEING



## LIVING BEHIND 4 WALLS

Protect. Prove. Hide. Defend.



## CONDITIONAL LIVING

When (this happens), I'll be (happy).

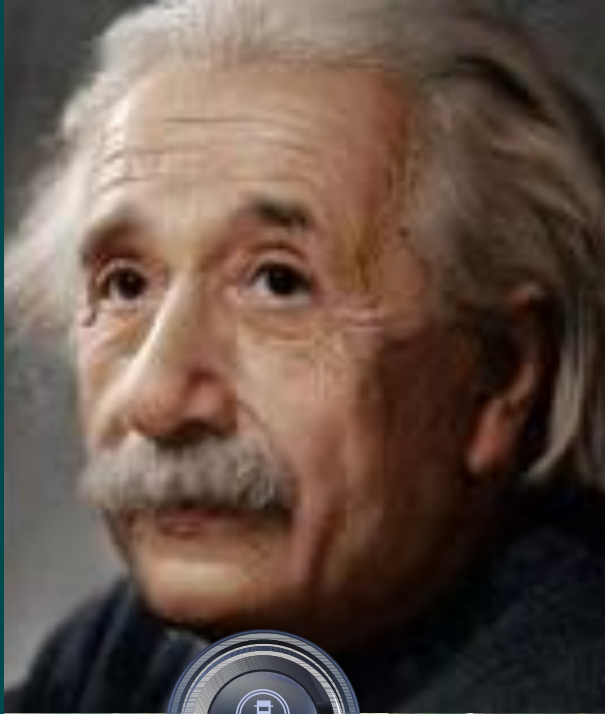


## EGO-DRIVEN

If (s/he) would just (act the way I want) then everything would be OK and I would be (happy).

S  
S  
E  
T  
T  
M  
T

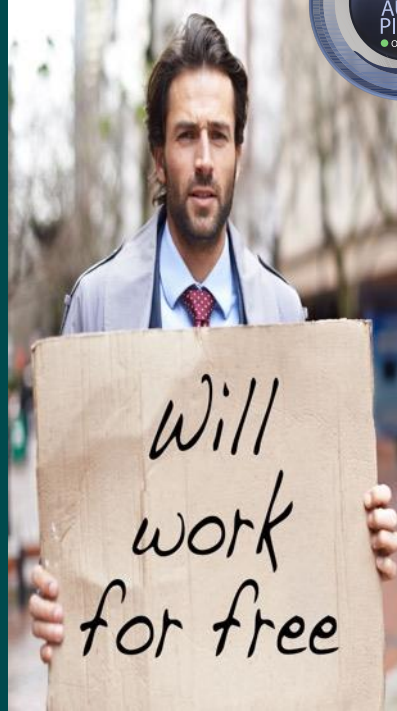
# THOUGHT HABITS



# BEHAVIOR HABITS

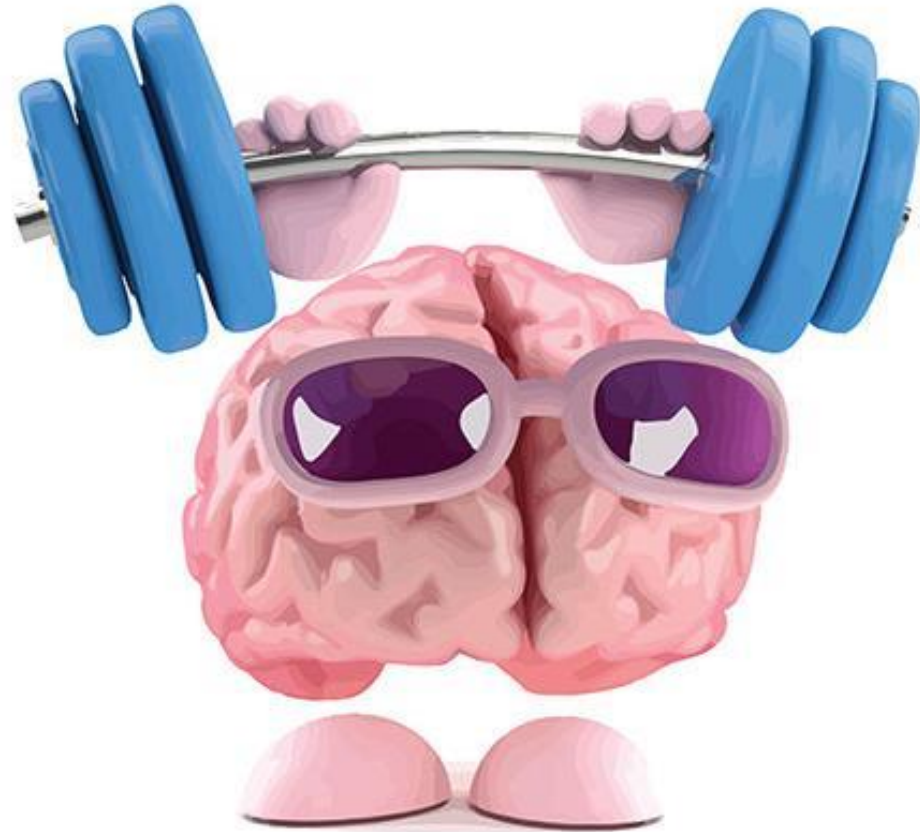


# BUSINESS HABITS



APPLYING WHAT  
YOU LEARN

LIMITLESS



# RETRAIN YOUR BRAIN

A Crash Course  
on how to re-train your  
brain to elevate your  
**WORK, WEALTH & WELL-BEING**



WHAT'S ON YOUR MIND

I can do it faster and better myself

I can't charge (more)

I can't keep up with all the work

There's just not enough time to get it all done

I have too many clients

I'm the only one who does things right

I hate managing people

If they would just do what I need, everything would work great

I'm not good at marketing

I don't know what to deliver to clients to demonstrate value

Objections are awful; I don't know how to respond to them

Systematizing things will water down my clients experience

I tried everything; marketing doesn't work



# THE 7 MINDSETS OF SUCCESS



LIMITLESS

Am I Worth It?  
Will They Say Yes?  
*Can I Say No?*



# SHIFTING INTO SUCCESS-STATE

LEARNING TO MIND YOUR LINE



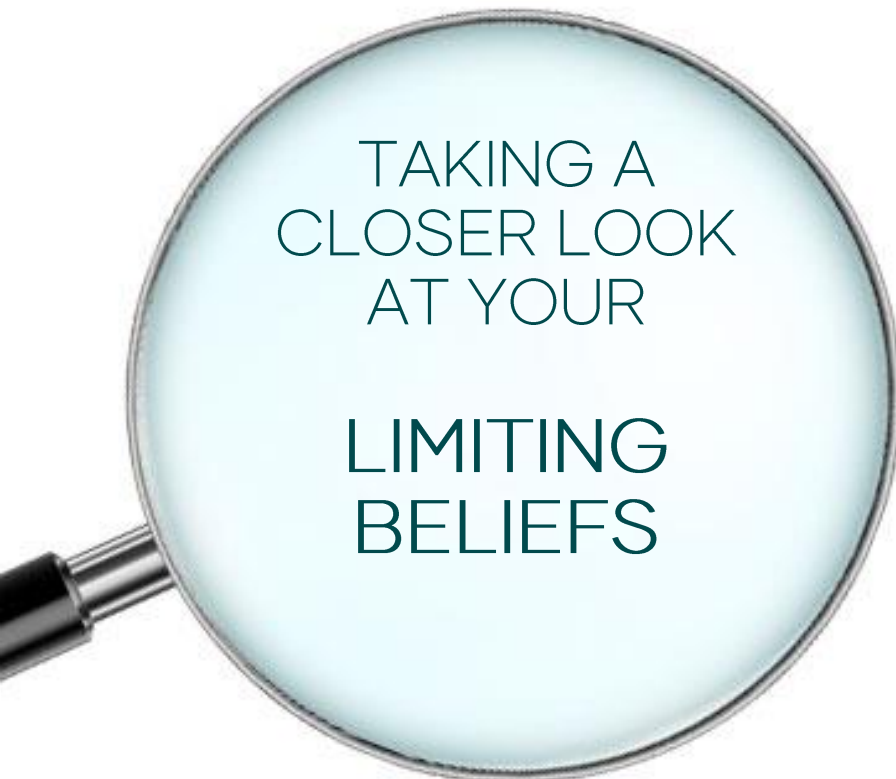
*SUCCESS STATE*



*STRESS STATE*



S  
S  
E  
T  
M  
L

A magnifying glass with a black handle and a silver rim, focusing on the text inside its lens. The lens is a light blue circle.

TAKING A  
CLOSER LOOK  
AT YOUR

LIMITING  
BELIEFS



What do you want?  
What's your story about why  
you don't have it?



What's the benefit of this  
belief? How does it serve you?



How does this belief get in your  
way?  
What's it costing you?

# BUILDING NEW & BETTER STORIES

## FIRST, NOTICE THE FEELING

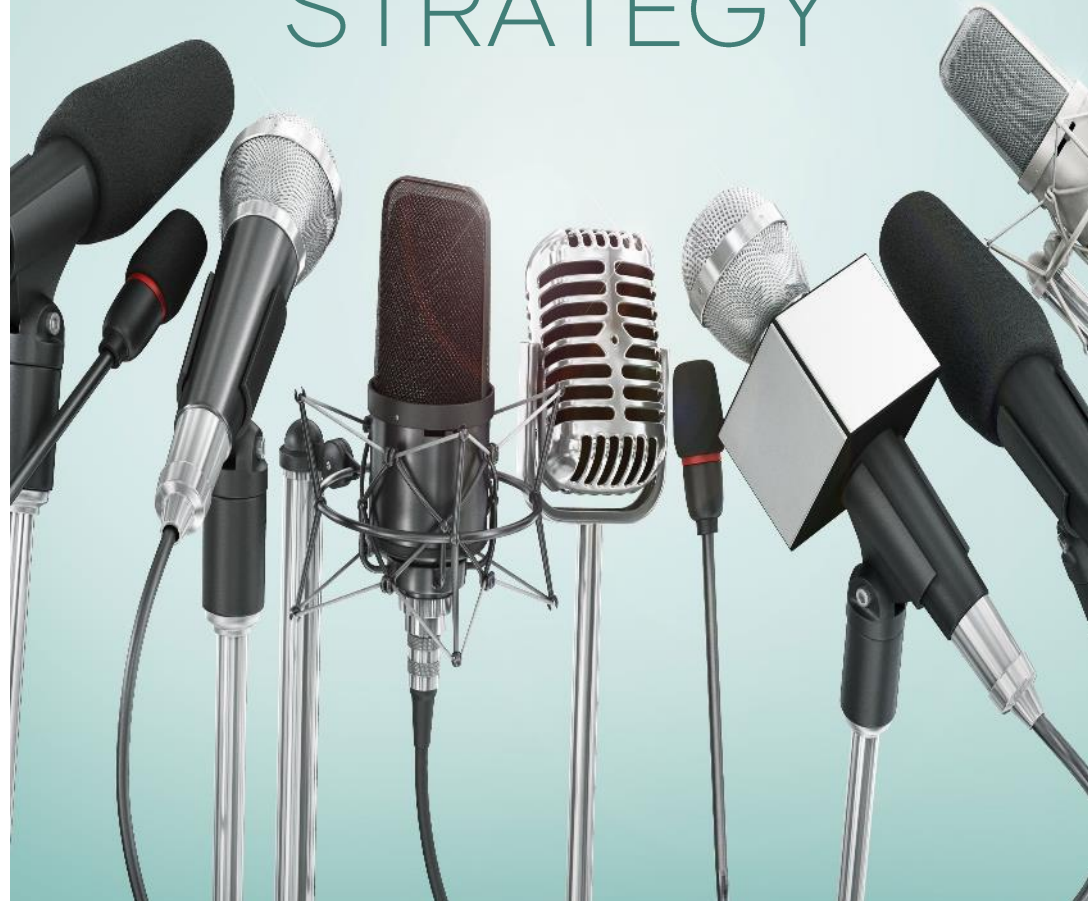
- FEELINGS ARE INDICATOR LIGHTS
- ACCEPTANCE > AVOIDANCE
- NOTICE THOUGHT BEHIND FEELING
- CHALLENGE AND REPLACE

## THEN, ASK 5 KILLER QUESTIONS

1. WHAT'S HAPPENING?
2. WHAT'S HAPPENING, *really*?
3. WHAT IS THE STORY BEHIND FEELING?
4. IS IT REALLY TRUE?
5. WHAT DO YOU CHOOSE TO BELIEVE?

## THE CATCH & CORRECT

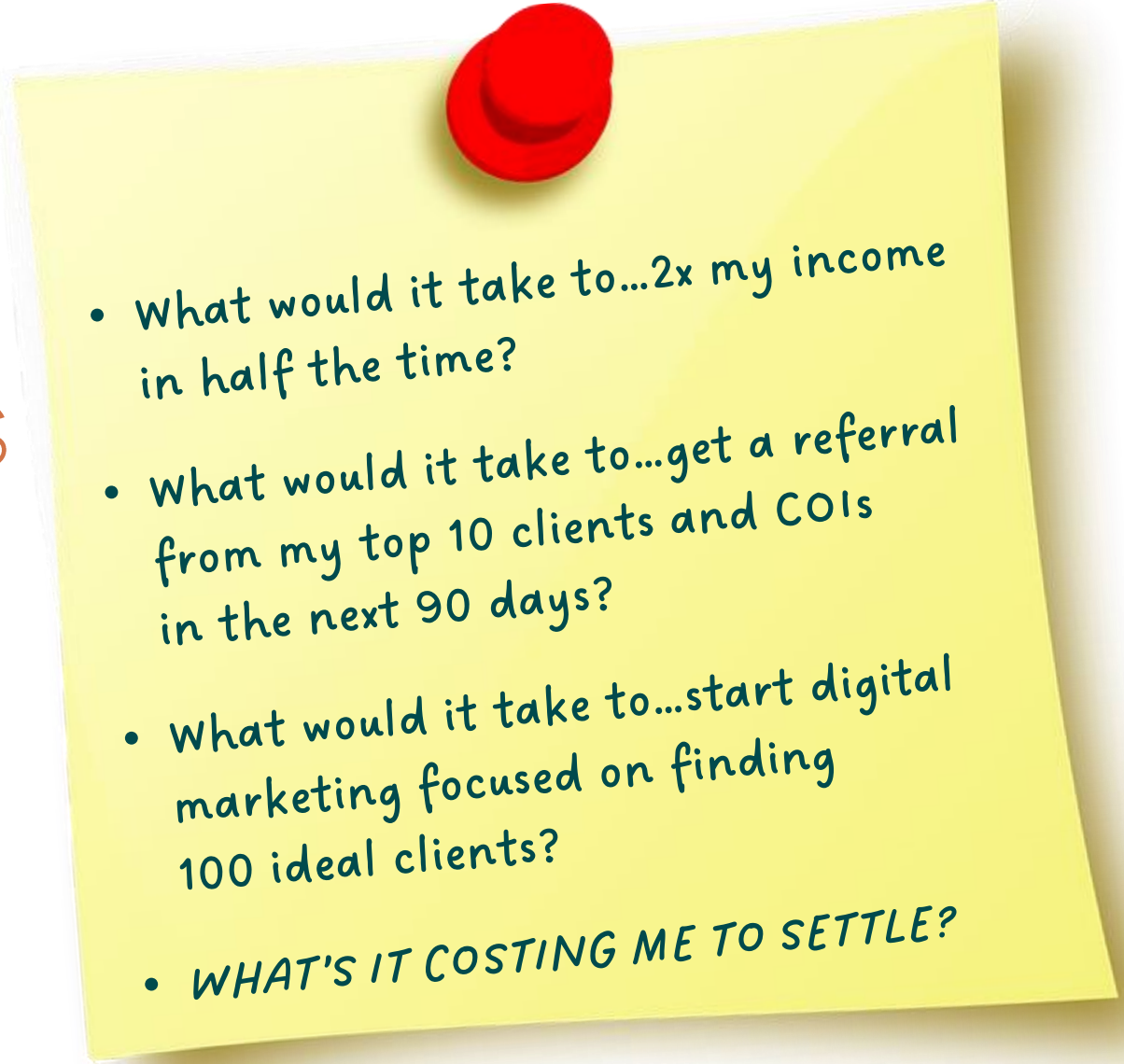
# A STORY-SHIFTING STRATEGY



S  
S  
E  
T  
M  
I

# ASK BETTER QUESTIONS

GET BETTER ANSWERS

- 
- What would it take to...2x my income in half the time?
  - What would it take to...get a referral from my top 10 clients and COIs in the next 90 days?
  - What would it take to...start digital marketing focused on finding 100 ideal clients?
  - **WHAT'S IT COSTING ME TO SETTLE?**



S  
S  
E  
T  
T  
I  
M  
E



# SHIFT YOUR THINKING, SHIFT YOUR LIFE

Your beliefs, judgments, fears and shoulds tell a story that drives your mindset and shapes your perception of reality. By becoming aware of these stories, you deepen your understanding of your mindset and take action to shift your thinking. When you shift your thinking, you will shift your life.

## IDENTIFYING WHAT YOU WANT TO IMPROVE

Select a desired habit that you want to improve, have started and stopped, or you are not improving/taking action on quickly enough. These may show up as things like not leaving on time consistently, avoiding contacting clients or prospects, exercising more, working less, procrastinating, allowing constant interruptions / loss of focus, working less.

Describe what you want to improve here:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

For the above, rate where you are on a scale from 1 to 10, 1 low/7 high, not judging yourself. The judgment costs.

MY RATING: \_\_\_\_\_

## Overcoming Overwhelm

Identifying where you are on the overwhelm scale, out of an overwhelm state. Determine which level of overwhelm is also important, as this is the story that places. This conversation in your head changes to parts into OVERWHELM. Finally, identify how overwhelm

- On a scale of 1 to 10, 1 low/7 high, please rate:
  - I easily get overwhelmed
  - I regularly get overwhelmed
  - I identify as a perfectionist
  - I hold higher standards for myself

- I feel overwhelmed because \_\_\_\_\_

- My story about this is... \_\_\_\_\_

- To me, overwhelm feels like... \_\_\_\_\_

## 7-Mindsets Money

We all have a back story about money, one we grew up hearing or that has been reinforced or challenged throughout our lives. In the first column, identify the negative beliefs you may have around money for each of the 7 mindsets. For example, in the worth column, you may list, "Making money makes me dirty." Next, challenge your money story by answering the question in the Challenge column below. Last, create a new, empowering money story, such as "Money does not define my worth" to reinforce your relationship with money.

MINDSET	NEGATIVE Identify any negative limiting beliefs about money related to each mindset.	CHALLENGE Think, "Is that really true? Are you sure? Do you really know it's true, evidence do you have?"	POSITIVE Now, create your negative, challenging belief which does money for you one, an empowering belief that puts you in a success state.
WORTH			
CLARITY			
VALUE			
TIME			
LEVERAGE			

## Above the Line: Self-Talk

Name: \_\_\_\_\_ Time Period: \_\_\_\_\_  
Subject: \_\_\_\_\_

### ENERGY PRODUCING & REVENUE CREATING

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

ABOVE THE LINE  
BELOW THE LINE

### ENERGY DRAINING & REVENUE DEPLETING

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

# 7-Mindsets of Success

The stories we tell ourselves are incredibly powerful, and can either keep us stuck or be the catalyst for change. List what you are currently telling yourself in each of the 7 mindset categories under "Old Story." Then, create and record the new story you want to believe. Consider which action steps you would need to take to make that new story a reality and record them under "Action Items." Consider adding these to your Success Shifter to create new beliefs and habits.

## KEY LEARNINGS



WORTH

Old Story

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

New Story

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## ACTION ITEMS

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_



CLARITY

Old Story

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

New Story

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_



VALUE

Old Story

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

New Story

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_



TIME

Old Story

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

New Story

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_



LEVERAGE

Old Story

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

New Story

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_



RELATIONSHIPS

Old Story

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

New Story

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_



MONEY

Old Story

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

New Story

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## 7-Mindsets of Success

The 7 Mindsets of Success reflect your perspective in areas essential to expanding yourself and your success. Learning to master these mindsets is the key to raising your standards and stepping into a bigger, better future.

- WORTH** Knowing your worth is what allows you to face business and life with confidence. When we look to external factors for worth and validation, we compromise our standards when challenging circumstances arise. If we see this in others, discouraging lies, surroundings breaking down and CEOs struggling to manage their high-powered executive teams to their fullest potential. Our sense of personal worth is what allows us to face challenges and conflicts with confidence, without compromising our values.
- CLARITY** Gaining clarity about what you want, and why, is an essential ingredient in up-leveling your success. Too often, we react to daily circumstances rather than being driven by a sense of clarity about what we're trying to achieve. We often speak with my clients about how easily distracted they are and their tendency to chase "shiny things." Without clarity, our circumstances can easily get the better of us and shift our focus away from what we really want, leaving us reacting to do to-day demands or chasing the next new idea before finishing the last. With clarity comes the ability to focus our time, attention and resources on the actions that will truly "move the needle" and produce meaningful progress toward our goals.
- VALUE** Knowing the value of what you do is a key success factor. For too many advisors, regular discounts their value in ways large and small. When you have a strong sense of the value you provide, you approach situations with greater ease and confidence. It's critical that you present your offering as a high value commodity, not a bargain basement. When you establish a standard - say in fees, minimums or client type - and then make an exception, what you're really saying is "I don't think I can be successful holding to my standards, so I'll compromise my value in the hopes that it helps me get there." Such compromises may make you more money in the near, but too often end up creating unnecessary struggles on the path to greater levels of success.
- TIME** Advisors don't actually suffer from a lack of time, they suffer from a lack of knowing how to manage and make the most of it. The pace of your progress will be driven by what you choose not to spend your time on, as much as by what you do choose to spend your time on. When you possess a strong sense of worth, clarity and value, you become clear on the practices that will deliver results, and focus your time on these areas. Too often advisors and executives spend their time "running the shop" instead of "leading the charge" in an email and administrative rather than on revenue-producing activities. Managing your time is your greatest obstacle, but rather your greatest opportunity.
- LEVERAGE** Leverage is using the resources you have to maximize your impact and results. Many advisors struggle to extract the level of leverage possible from their packaging (branding, sales and marketing), people, process, and platforms. This is most often a symptom of other issues that result in difficulty delegating, perfectionist tendencies, control issues, fear of investing in tools, and/or the perceived need to do everything personally because, well, you do it better than anyone else can. Leverage is about using your resource to maximum advantage.
- RELATIONSHIPS** Our relationships are a key contributor to our success and happiness at work. Advisors often don't truly enjoy the people with whom they are working. Concentrating on your staff in terms of quality, capability or cultural fit undermines performance, productivity and profitability. Add to this that many advisors have client relationships that are difficult and that they don't enjoy, and it's not hard to see where some of our success and satisfaction is lost. Creating a practice that connects to working only with people they truly enjoy will make work a more rewarding experience.
- MONEY** A positive money mindset is a major contributor to an advisor's level of financial success. This means that you believe you deserve to earn more, and allow yourself to do so. Such a mindset also recognizes that you're not in a recession, except a good amount on that investment and that money is an exchange of value between two parties that should be fair and reciprocal. A successful practice is built on a strong financial foundation. This includes profitability at both the client and firm level, as both are key components in the financial success, and ultimately the success of the advisor. I don't know many advisors that would tell their clients to stay in an under-performing investment, yet advisors will, stay in an unprofitable relationship. Mastering your money mindset will deliver a greater level of financial success through the better decisions it fosters.



L I M I T L E S S

## TERMS & CONDITIONS

You can be,  
have, achieve  
and experience  
whatever you  
desire.

You simply have  
to raise your  
standards.





LEARN

- The Formula for Change  
*Stephanie Bogan*
- Take the Uncomfortable Leap  
*Stephanie Bogan*
- Harnessing your Head Trash  
*Stephanie Bogan*
- Mindset: New Psychology of Success  
*Carol Dweck*
- How to Unf\*ck Yourself  
*Gary John Bishop*
- Think & Grow Rich  
*Napoleon Hill*



APPLY

- Watch  
Mindset Mastery Learning Path
- Review  
7 Mindsets Guidebook
- Complete  
Lesson exercises/resources



ACT

- Use Success Shifter to define and reinforce new, empowering habits
- Start AM/PM Routines & Rituals
  - Morning Practice how you start your day sets your day; 10 mins day to big shifts
  - Mindfulness or meditation practice
  - Journaling
  - Vision, Goals, Big Why reflection
  - Set daily intentions
  - Evening review & reflection
- Practice "Catch & Correct"
- Attend Mindset Coaching calls



LIMITLESS Q&A

