

# LIMITLESS ADVISER RETREAT



WEDNESDAY - FRIDAY

*The Art of Advice*

March 18-20, 2020

## PRE-RETREAT WORKSHOPS & RECEPTION

### **Mastermind Pod Training**

*Wednesday, March 18th 1:00 PM – 2:30 PM*

If you are looking for a way to keep stay on track and achieve your goals, then you'll want to join a Mastermind Progress Pod. During this time, we'll teach you how to connect with your group, hold each other accountable and get the most out of Limitless. We'll give you an overview of how Masterminds can support you during our Kick Off call. If you registered for a pod during enrollment or were unsure and want to join, be sure to register for this pre-retreat session.

### **Fireside Chat with Stephanie**

*Wednesday, March 18th 2:30 PM – 4:00 PM*

Stephanie will spend an intimate hour sharing her own journey on the path to living The 5 Freedoms, as well as the challenges she faced, and the path, tools, tactics and techniques she used to transform her business and life.

### **Limitless Reception**

*Wednesday, March 18th 5:00 PM – 7:00 PM*

Join us for a "getting to know you" time with your peers. Reception will include new friends, fun and free drinks. The most valuable thing you'll take away from these retreats will be new relationships with your Coaches and like-minded peers who share your commitment to building a wildly successful business and life that you love.

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## THE ART OF ADVICE

THURSDAY & FRIDAY, MARCH 19 – 20TH 8:45 AM – 5:15 PM

### *The Essentials Track*

For new members, the *Essentials Track* provides you the core building blocks you need to build a practice that allows you to live The 5 Freedoms. Over the year, you will learn how to master your mindset, perfect the art of advice, tell your story, work with the right clients for the right fees, and follow proven processes to systematize your specialized service – all so that you can achieve simpler, more satisfying success.

- **The Art of Advice:** Your value is advice, not information. Earn the trust and confidence of your clients and create more meaningful relationships by learning how to master the art of advice.
- **Mindset Matters:** Gain insights from the latest science on success to master the “7 Mindsets of Success,” delve into what’s holding you back and complete exercises to bust your limiting beliefs.
- **Telling Your Story:** Learn how to successfully define, package and tell the story of who you are, who you serve and the value you deliver in a way that ensures you never have to sell your story.
- **“Say Yes, No Stress” Prospect Process:** Designing an engaging client journey—from interest to awareness to education to decision—helps you get the “yes” without the stress.
- **The One-Page Plan:** Avoid the confusion and crutch of relying upon thick plans by focusing instead on what matters most to clients with a simple yet powerful One-Page Plan.
- **WOW! Service System:** Scaling services doesn’t mean watering down your value. Define segments and service levels to systematize your specialized process, delivering a client experience that “surprises and delights.”
- **Setting Up, Sharing & Stepping Up Fees:** Value yourself and charge what you’re worth. This positive transition involves clearly identifying your fees, assessing whether you are currently serving your ideal clients, and then communicating changes to your clients.

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## **The Expanded Track**

For alumni and more advanced practices, the Expanded Track will help you take your game to the next level. Here you will learn how to achieve high-performance happiness, go deeper with conscious client conversations, master the art of advice and develop specialized experiences that deepen the value you deliver in ways that truly differentiate your firm.

- **Conscious Conversations:** Move beyond technical expertise to build deeper relationships with High Net Worth Clients by identifying their real issues and having candid, conscious conversations while delivering massive value.
- **Client Experience 2.0:** Maximize client engagement and take your client experience to the next level by elevating and customizing your process and experience to reflect the growing shift toward specialization in the emerging experience economy.
- **Fabulous 1st Meeting:** Build credibility and trust in your 1st meeting with prospects by elevating the conversations to quickly get to the heart of what matters most so that you can deliver truly personal advice. Learn proven strategies to engage all clients in deeper, more meaningful ways, while also learning to engage with HNW prospects in a personal, more powerful way.
- **High-Performance Happiness:** Master your mindset to break patterns and build habits that amplify your personal productivity, performance and prosperity to experience “high-performance happiness” at professional and personal levels that can profoundly change your business and life.
- **The Art of Leadership:** Leadership is an integral part of every firm, regardless of size. Whether you have a part-time Virtual Assistant or lead a multi-adviser firm, learn to live and lead with purpose to achieve more of what’s possible for your business.
- **The One-Page Plan 2.0:** If you’ve already started using the one-page plan, it’s time to take a deeper dive into how to you use it with clients to help them bridge the gap between where they are and where they want to go.

## **The Mindset Track**

The **Mindset Track** is for advisers that are ready for more intensive, personal support in mastering their mindset. If you are ready to understand and identify your limiting beliefs and behaviors so that you can shift into and operate from your success-state more of the time, register for a Mindset session. These are small-group peer sessions with Master Coach Alyse where, together, you will dig in and tackle the BS (belief systems and literal BS) holding you back. These sessions require pre-registration, which will open in advance of Retreat. **Warning: participating in a Mindset session will very likely improve your future.**

## **The Team Track**

In addition to the Essentials Track, staff and support roles can attend our **Team Track** where in-the-trenches Team Coaches share their real-life experiences supporting Limitless Advisers and facilitate discussions to help your team implement the limitless lessons with success. These sessions will focus on personal productivity, supporting client surges and setting up processes, and will include time for open Q&A.

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## OPTIONAL RETREAT ACTIVITIES

### **Breakthrough Breakouts**

*Thursday 5:45 PM – 6:30 PM*

Join us for optional Breakthrough Breakouts, intimate 45-minute discussion group sessions led by Faculty and Coaches to help you have a breakthrough in specific areas of need. These small-group breakouts cover everything from the strategic to every-day practical; simply select the session most appealing to you. Past topics have included setting a vision, producing podcasts, and raising fees on current clients. These are among our most popular sessions, so be sure to grab a snack or a cocktail to keep your energy up.

### **Friday Fun & Frolic: The Ghosts of New Orleans**

*Friday 8:00 PM – Until the Fun Stops*

Be sure to stay through Saturday so that you can join us for Friday night's post-retreat festivities. After 2 days of intense learning and growing, you'll be ready for some serious fun and frolic with your new tribe. We organize a group activity for Friday night to create time and space for the most important part of Limitless Adviser Coaching – connecting with your peer community. This event embodies two important principles: no one succeeds alone and you might as well enjoy the ride! Please note that The Ghosts of New Orleans is a walking tour and an additional cost of \$20 applies. Pre-registration is required to attend.