

WELCOME

MARCH COACHING CALL



Inbox Insight

- Weekly “go-to” point
- Weekly Coaching
- Important News & Upcoming Events



Good Vibes Tribe

- Get in a groove (1-2x week check in)
- Tribe Talk is open and awesome
- New Tribe-Driven Coaching Calls



Launch Advisors

04.12

Lifestyle Coaching Call

5.12 - 05.14

Value U. Virtual Retreat

FOR TODAY'S QUESTIONS

[slido.com](https://www.slido.com), [#lifestyle](https://twitter.com/lifestyle)

on your phone or second screen

Limitless Coaching Call

MARCH 22, 2021

Defining Your Value



TODAY'S COACHES



BENJAMIN BRANDT

"Don't half ass 6 things;
whole ass one thing."

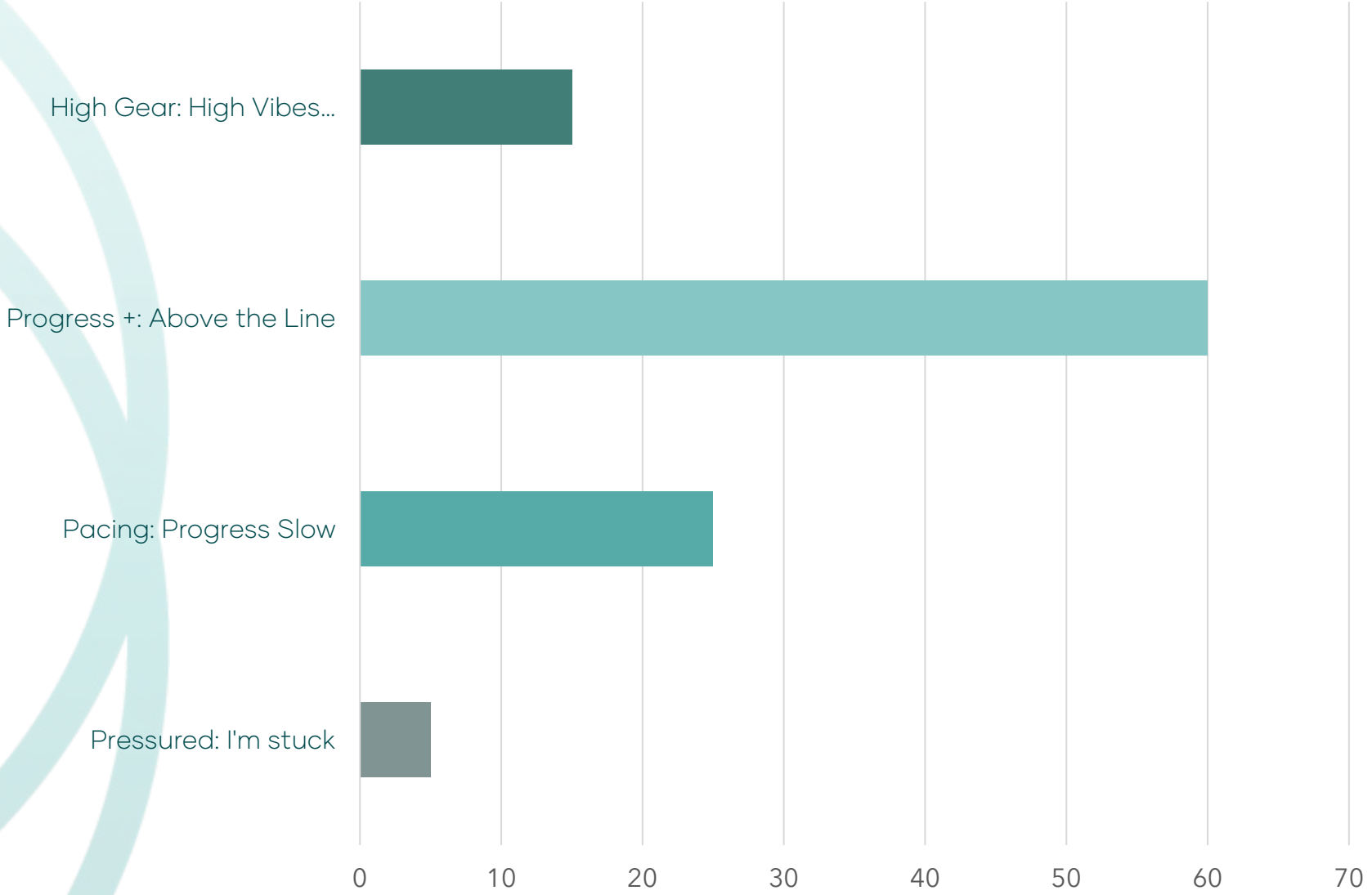


STEPHANIE BOGAN

"Your understanding of what drives
your behavior is the most valuable
business and life tool you have."

CHECKING IN: How are you feeling?

Answered: 63
Skipped: 0



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Science of Success



Your Vision for Success



My Model Practice



Power of Productivity



Action & Accountability

Big Levers

This business levers checklist will help you get clear on your upcoming priorities. Place a check beside the action items you would like to focus on for the next quarter.

MINDSET:

- Clarify my beliefs, thinking and self-talk
- Clarify Success (offer or product) to client improvements to my habits
- Own my future and identify 3 bold steps

PRODUCTIVITY:

- Stop wasting my time; get a system for managing my time
- Implement Client Targets
- I like to focus on Client Work
- Virtual Assistant, PFT (1-2 hrs wk as start)
- Virtual Assistant (skill of 8)
- Client Service Assistant
- Top Writer
- Service Advisor
- Manager/COO
- Personal Assistant

FEES:

- Stop compromising; set and stick to minimums
- Know my value, raise A/R and/or planning fees
- Know my value, start charging planning fees
- Stop doing free work for clients (at least charge hourly)
- Transition/soft unprofitable or not-right clients

CLIENT SERVICES:

- Build a Client Service Model/Schedule
- Implement use of the One Page Financial Plan
- Schedule meetings around 45- or 75-minute meeting blocks
- Create an "onboarding first meeting" process

OPERATIONS:

- Standardize processes and procedures
- Automate work flow
- Build my prospect process
- Design my client onboarding process
- Update tech stack
- Create work flows for key process

GROWTH:

- Build a Marketing Action Plan
- Drive growth through COIs
- Drive growth with digital marketing
- Drive growth with referrals / social
- Drive growth with content / scale
- Build a prospect process that retains the right clients consistently
- Build an online sales funnel / prospect process
- Build branding and messaging
- Narrow and market to my niche
- Conduct a website audit; outsource to sub team

PLANNING & PERFORMANCE:

- Build a firm business development strategy
- Take short-term growth
- Develop a strategic planning and quarterly review process
- Implement weekly team meetings

Pick your top three to focus on this year:

- _____
- _____
- _____

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Nailing Your Niche



Telling Your Story



Finding Your Fee Model

COMMUNICATE VALUE

LIMITLESS


InvestmentNews

News & Analysis | Retirement News | ESG | FinTech | Tax Planning | Diversity | Practice Management | Regulation | Women Advisers

Research & Data | Events | Awards | Video | Podcasts | Webcasts | White Papers

THE LIMITLESS ADVISER

How do you define your value?



Building a thriving practice isn't about building a business case for your value and fees; it's about building your belief case.

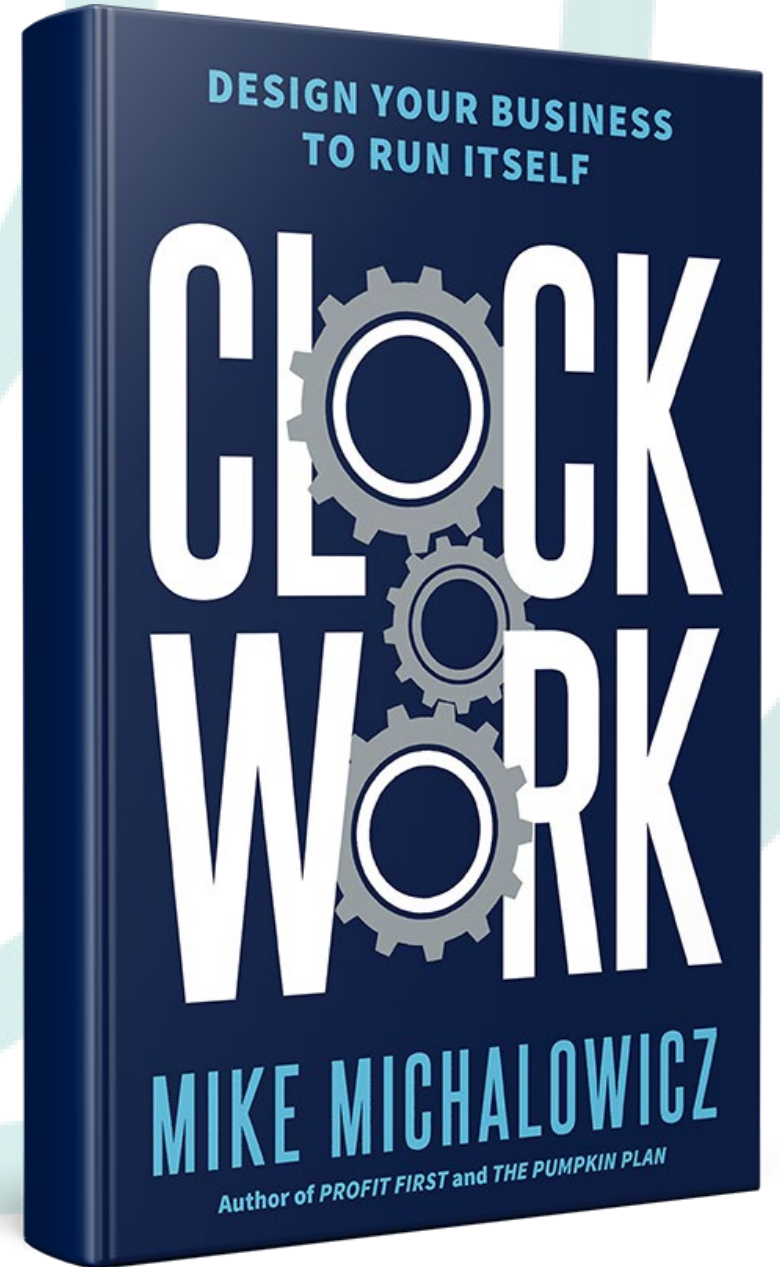
March 1, 2021 | By Stephanie Bogan

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You are scree

Defining value is the most ambiguous problem in our profession. And the inability to define your value can be debilitating for you and the prosperity of your business.

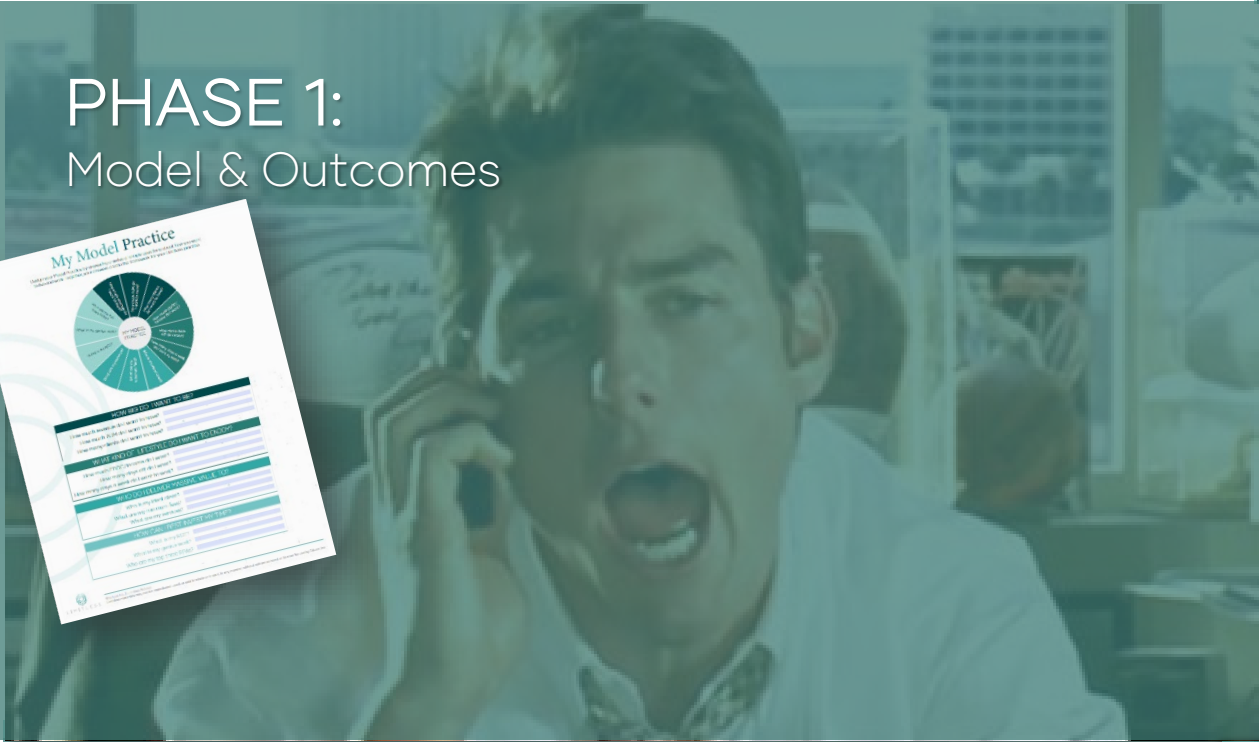
DELIVER VALUE



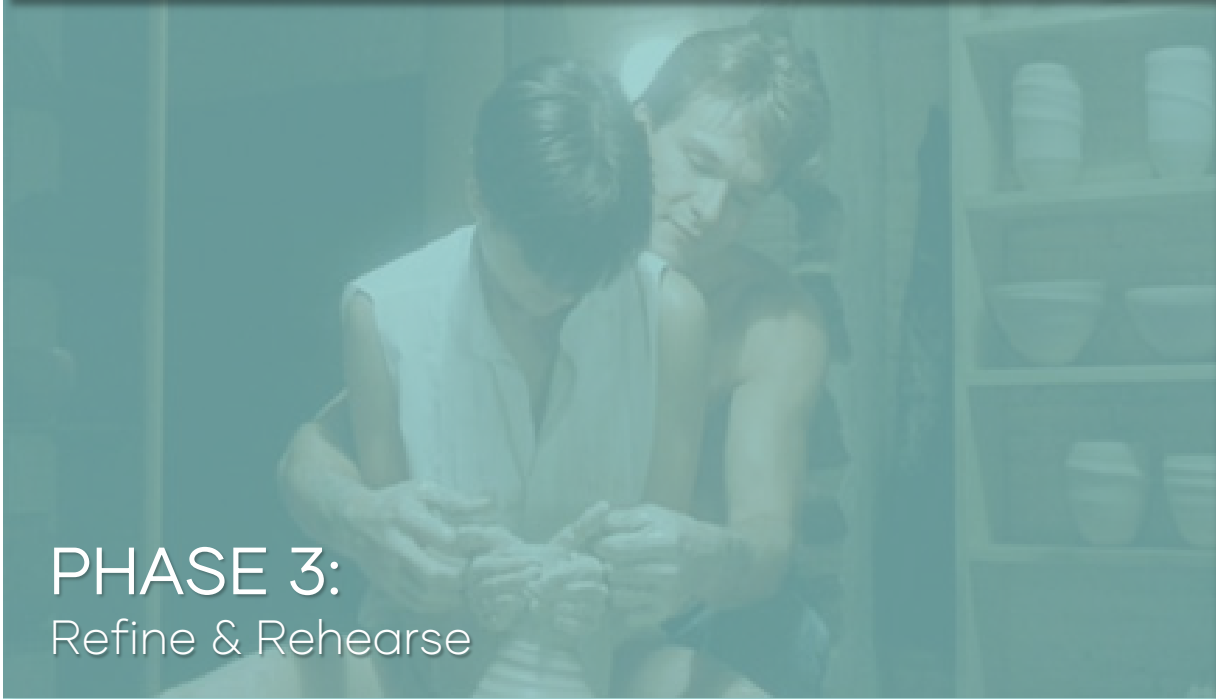
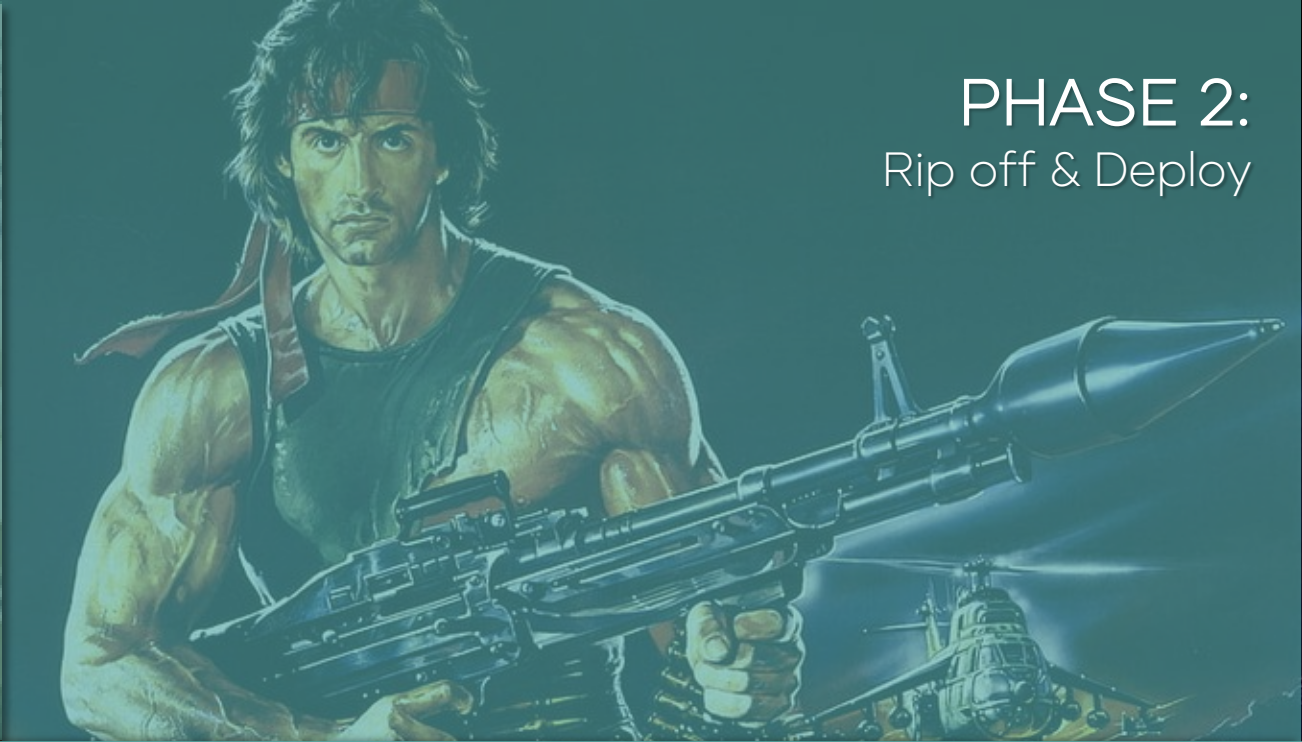
Define the Invisible



PHASE 1: Model & Outcomes



PHASE 2: Rip off & Deploy



PHASE 3: Refine & Rehearse



PHASE 4: Re-deploy & Ramp Up

Putting Your VALUE into Play

My value proposition is...

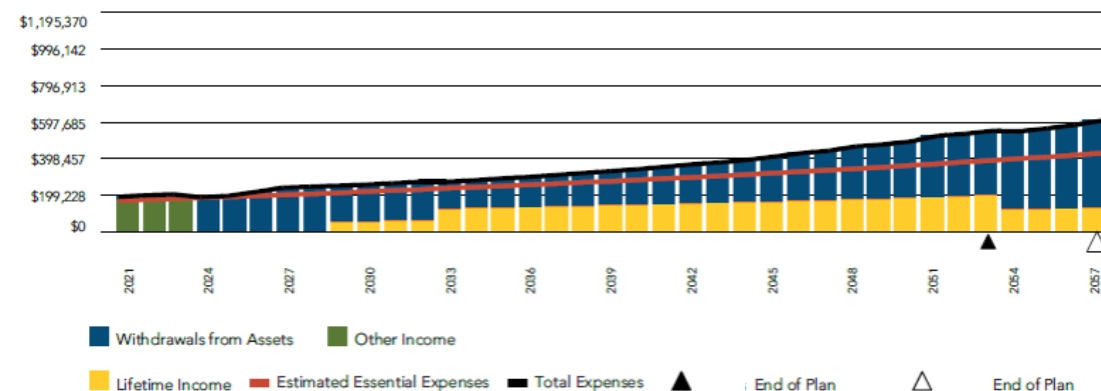
"I do _____ and others don't."

"I don't do _____ and others do."

Ben's value proposition: Taxes & Guardrails

Highlight client's pain point & possibility

Your income could potentially last	Cumulative Lifetime Income	Assets at end of plan
37 years	\$3,776,751	\$13,294,201



- Clients are Jim & Pam (fake names) They are 59 & 60.
- They have \$3,000,000 in assets and have a retirement income budget of \$200,000.

The AWARENESS Audit



SHIFT YOUR THINKING, SHIFT YOUR LIFE

Your beliefs, judgements, 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 learning on time consistently, avoiding contacting clients or prospects, expecting more, working less, procrastinating, allowing constant interruptions / loss of focus, working less.

Describe what you want to improve here:

Above the Line: Self-Talk

Name: _____ Time Period: _____

Subject: _____

ENERGY PRODUCING & REVENUE CREATING

Overcoming Overwhelm

Identifying when you are in an overwhelmed state is an essential first step in getting out of an overwhelmed state. Determine what level of overwhelm you experience on a regular basis, and who causes you to feel that way. Identifying the reason or story behind your overwhelm is also important, as this is the story that creates the overwhelm in the first place. The connection in your mind changes so long as the "old story" or a lot of moving parts in your OVERWHELM. Finally, identify how overwhelm levels in your physical body.

- On a scale of 1 to 10, 1 low/10 high, please rate your experience of following:
 - a. I easily get overwhelmed
 - b. I regularly get overwhelmed
 - c. I identify as a perfectionist
 - d. I hold higher standards for myself than I would for anyone else
- I feel overwhelmed because: _____
- My story about this is: _____

7-Mindsets of Success

The stories we tell ourselves are incredibly powerful, and can either be kept in check or be the catalyst for change. List what you are currently telling yourself in each of the 7 Mindsets (Old Story) Then, create and insert the new story you want to believe. Consider which actions 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 Stories to create new beliefs and habits.

KEY LEARNINGS	Old Story	New Story	ACTION ITEMS
WORTH	Old Story	New Story	
CLARITY	Old Story	New Story	
WALLS	Old Story	New Story	
TIME	Old Story	New Story	
LEVERAGE	Old Story	New Story	
RELATIONSHIPS	Old Story	New Story	
MONEY	Old Story	New Story	



SUCCESS TRIAD

PAIN IS INEVITABLE, Suffering is Optional



It doesn't have
to be broken to
be better



Keep yourself
on your side
of the street



Put
down
the stick



Control
is a
myth

The ENGAGEMENT Audit

LIFESTYLE &
LAUNCH



Tribe



Monthly
Coaching
Call



Monthly
Office
Hours

“LIFESTYLE”
MASTERMINDS



Coaching
Call #2



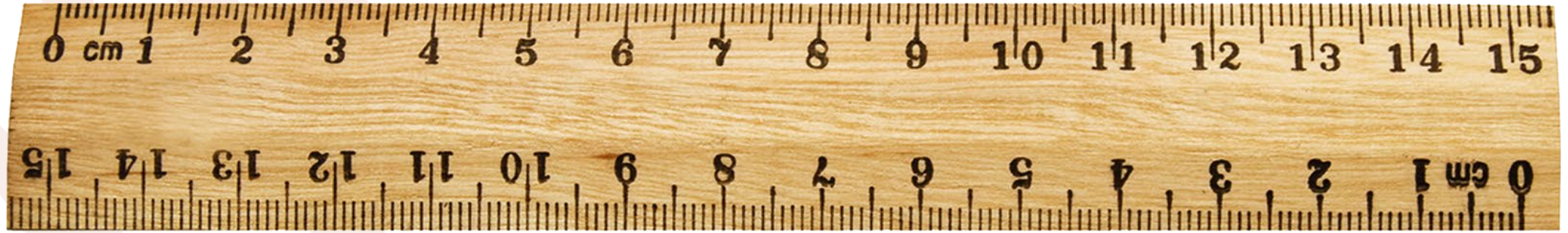
Monthly
Office
Hours



1:1 Coach
Calls

L I M I T L E S S

The Progress AUDIT



3 Biggest Wins/Gains
From Quarter:

[1] _____

[2] _____

[3] _____

The Main Thing for Next Quarter:

[1] _____

Current Reality

Desired Future



The MAIN Thing

LIMITLESS

- 1 | Member Advisory Board
- 2 | May Retreat Update
- 3 | Upcoming:
04.12 Lifestyle Coaching Call: Engagement
- 4 | Office Hours And Joint Call





LIMITLESS Q&A