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*Build it like you love it*

from my more than \$1,000,000 of mistakes made due to Money Dysmorphia, I, Ali, present to you this Manifesto. Save yourself from the continued heartache and pain of a distorted view of money, and the blind choices you may be making as a result.

THE MONEY DYSMORPHIA MANIFESTO

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# MONEY DYSMORPHIA MANIFESTO

LIFT your Life and Business to a New Level

## *Who Should Read This Manifesto*

This Manifesto is for you if you are ready to move beyond limitations that have previously kept you stuck, unfulfilled, or unsure, and step fully into the greatest possibility for your life.

When you are making choices from the blindness of money dysmorphia, and don't have solid LIFT foundations in your life and business, it's reflected in the way you show up. Whether you're a founder of an early-stage startup, a business owner earning 6-7 figures+ in revenue, a solopreneur, an independent contractor or freelancer, or an intra-preneur (an employee of a business working with an entrepreneurial mindset) --your money dysmorphia is reflected in the way you treat people and the way others treat you.

Some part of you knows you are living and working less optimally than you can be. And it very likely hurts. It hurts you and it hurts others. You may see the pain in the world and feel powerless to change it -- but you aren't. This Manifesto will show you exactly where your power exists.

It may seem like you have freedom, or that you are working toward freedom. But in reality, you're a slave to that which you cannot see – and true freedom will always elude you, until you become willing to open your eyes, make choices, and take action about how you use your time, energy, attention and money (TEAM) resources from a place of full awareness.

This Manifesto is in service to you making the Eyes Wide Open decisions that your life and business really need, not just for your own good, but for your family, and for your community. When you can make Eyes Wide Open decisions about the use of your resources -- no matter how much or how little you have -- you have a tremendous amount of power, and it's time for you to see it, step into it, and own your ability to make real change in the world.

### **Maybe you can relate to some of the following:**

- You are sure you have a valuable service or that you make great products or art, but you are perpetually not earning enough money with what you do have.
- OR you make plenty of money, but have no time to enjoy it because you keep maxing out your time.
- OR you can't seem to keep the money you are making.
- You feel fairly certain you're paying more in taxes than you should be (or want to be), but you don't know what to do about it.
- You're dealing with frustrating conflict in the form of misunderstandings, customer complaints, team let-downs, partnership failures, or other similar disappointments.
- You find yourself either repeatedly hiring the wrong people to support you in your business and secretly wondering if maybe it's you that's the problem, or you don't hire people at all and just do everything yourself, because it seems easier.
- You have a vague sense of unease that there's something you should be doing to protect your business and relationships (i.e. contracts, insurance, legal structure, intellectual property protection), but you aren't sure what that is, or where to begin.

- You have a desire to make change in the world, and yet you often feel as if you are not living into your highest potential or ability. You may even feel somewhat defeated in your ability to make change.
- You've tried many routes to make change, and yet keep seeming to get stuck repeatedly, and maybe you are even on the verge of just giving up on the idea of making change.
- You know you have something meaningful to offer the world, and want to collaborate with others, but it's just so hard to find the right people to work with. Every time you take one step forward, it also feels like one step backward.
- Some part of you has a sense that there are business systems and structures that you should know about and have in place to make everything easier and more reliable, but you don't know what you don't know.
- You want your work in the world to support your family, and leave a legacy of good.

It could be that you are even wondering if you need to throw in the business towel, wave the white flag of surrender and either go back to the safety of working for someone else - or maybe just being a consultant -- because being a business owner just feels like too much.

I've seen that happen a number of times among the elite entrepreneurial community I am part of, and now that I've seen it again and again, I know what's necessary for you to build something truly meaningful that lasts. Or maybe you are medicating away the pain of how hard it all is, with various forms of escape – Burning Man and marijuana were my escapes of choice. Yours might involve alcohol or simply numbing out in front of the TV (on the rare occasion when you aren't working 24/7 in your business) - only to find that when you return, it's all still there piled up and waiting for you.

Perhaps, it's not even any of that. To the outside world, it may even seem you are highly successful. But, something isn't right, and you know it. Here's the good news... it doesn't have to be like this for you.

If you are willing to truly see (and take full responsibility for what you see), you can LIFT your income, your life, and your business with a foundation that provides true security – and gives you the real freedom you've always wanted. But, to do it, you'll need to open your eyes and see beyond the Money Dystopia that may be driving your decisions. Don't worry, you don't have to go it alone.

**This does NOT mean you have to build a big, behemoth business or sell your soul (actually, this is more about infusing your work, life and business with soul).**

Nor does this mean you have to work all the time – in fact, it's the exact opposite.

With the right support structures in place, decisions made with eyes wide open clarity and the right advisors at the right time, you can finally enjoy a reasonable schedule, work from home (or anywhere else in the world), spend more time with your loved ones, and do work you love that makes a truly positive impact.

Whatever freedom looks like to you, it starts with being willing to shine a light in the dark corners of your life and your work, and fill in the gaps in your foundation – so you can know, to your core, that you are deeply supported as you do your Great Work in the world.

**This Manifesto will show you how.**

**LIFT your  
business to  
the next  
level with  
solid legal,  
insurance,  
financial  
and tax  
foundations  
+ a trusted  
advisor to  
guide you.**



# I Blindly Made Over \$1 Million in Mistakes, With Many Broken Relationships, (So You Don't Have To)



Hi, I'm Ali Katz. Today, I am the founder/CEO of a company that just got a valuation of \$15,750,000, completely bootstrapped from the ground up, no outside investors, no rich parents behind the scenes, and on the precipice of massive impact in the world, while I have the freedom to work from anywhere, and on my own schedule.

But it wasn't always like that, and I almost gave up on getting here many times. In fact, just three years ago, I was seriously shaken when I was working like a crazy woman, got a valuation of my business, after ten years of hard core effort, and the valuation team said my business was only worth \$250,000, even though I was bringing in more than \$2M a year in revenue. What?!? How could that be? Alas, it was true.

Once again, even though I had figured out how to make money, there was something way off. It turns out there was another level of Money Dismorphia operating, which was blindly compromising my future. More on that later.

I'm sharing this Manifesto with you so you can save yourself the years of heartache and pain it took me to get here. We simply don't have time for you to make the same mistakes I did. Your work in the world is important. Your vision is meaningful. Your family deserves for you to stop stressing out, compromising your life, and you deserve to know that you have enough, and will always have enough. Wouldn't that be so nice?

When I first wrote this Manifesto, my name was Alexis Neely, and I am still licensed by the California Bar under that name, if you want to look me up: (Alexis Martin Neely, California Bar #212365).

I'm not just a business owner, CEO, Founder, I'm also a trusted advisor to private clients and a mom. I tell you that, because I think it's important to know that I am more like you than you may think, and I don't want you dismissing anything you read here because I've got a big business now, and you don't. Yes, I have a big business now. And I also have a consulting practice, and a startup, and once upon a time, I was a waitress at Hooters, and even sold cars, and then worked at a big law firm, and had my own law practice.

So, wherever you are now, it's likely I've been there myself, or I might be on my way there now.

And, if you think that being a lawyer would somehow make me a better business person than you, or more knowledgeable than you, I can assure you that when I started out in business and before making the mistakes I am sharing with you here, that was not the case.

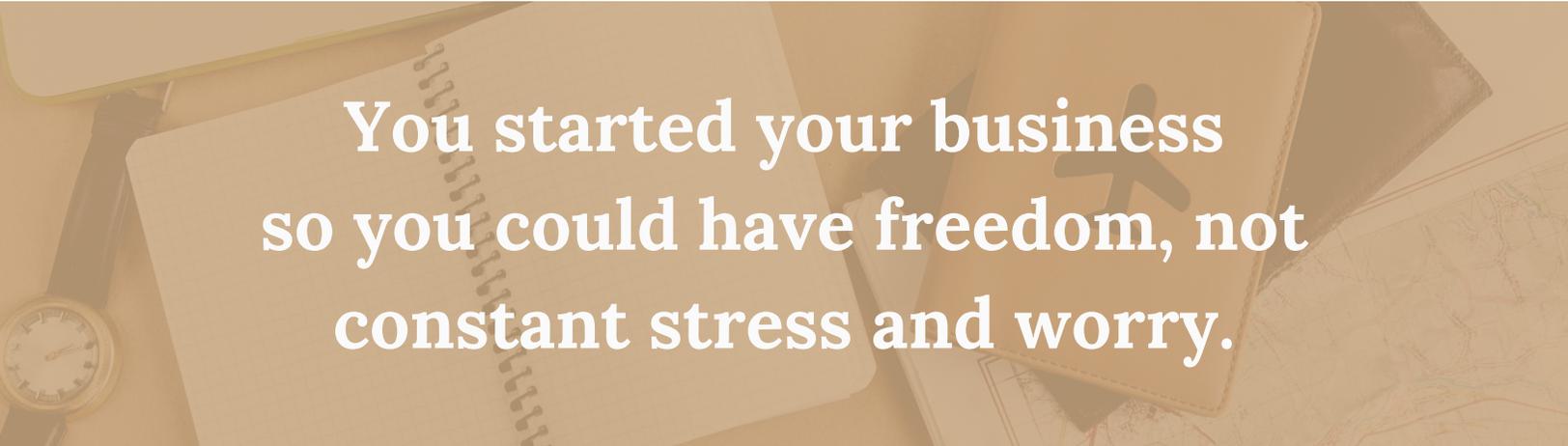
In fact, even though I went to one of the best law schools in the country, graduated first in my class and went to work at one of the best law firms in the country, Munger, Tolles & Olson (the law firm founded by Charlie Munger, Warren Buffet's personal attorney), when I opened the doors to my first business - a law practice - I knew nothing about business whatsoever.

I say all of this because I want you to know that if I can do it, you can do it ... it's been one of my mantras, when I've seen others who went before me, and I wanted to do what they had done -- If she can do it, I can do it.

I gift you this mantra now too, and you can use it to overcome any sort of "comparison despair" or "but I'm different" thinking that might try to get in your way from taking your next step and learning from my experiences. In my first 7 years in business, it appeared I was thriving and excelling. I had success rather quickly, building two businesses in rapid succession to the million dollar plus mark, writing a best-selling book and appearing on TV as a family, financial and legal expert, all before the age of 35.

And while it looked great from the outside, the reality was I was operating with a deep, hidden (even from myself) shadow – and doing business in the dark.

This is far more common than you might think.



**You started your business  
so you could have freedom, not  
constant stress and worry.**

Some part of me knew something wasn't right, but I dismissed it as nothing more than "imposter syndrome." Imposter syndrome was identified by two psychologists in 1978 as a feeling of "phoniness in people who believe that they are not intelligent, capable or creative despite evidence of high achievement."

And there was plenty of evidence of high achievement. But even with all my success, I was worried constantly. But I brushed away the voice that was often yelling at me in my head, telling me that something was seriously wrong. I figured I could fix it with some good old-fashioned positive thinking and by making more, more, more money. And in some respects, it appeared as if I was succeeding.

**I was taught to focus on earning as much money as possible, and I learned how to do that extremely well – building my first business - a law firm and then an online training company - to more than a million a year in revenue (in less than 3 years each).**

But, not only did the voice inside get louder each step of the way, I also began to see external evidence that maybe something really was off.

Unfortunately, it took me many years, quite a few ruined relationships, and losing over a million dollars to find out exactly what it was – so I could shine the light of truth on it, and wake up to what I wish I would have known from the beginning.

You see, I had never learned to do business and lead with my eyes wide open.

Instead, I carried with me a tremendous amount of conditioning around not having enough and not being enough, that I was fairly well blind to, which colored every decision I made. With the benefit of hindsight, I can see this feeling of "not enough" influenced ALL of my choices and actions.

See if you recognize yourself in any of these behaviors:

**I often felt the need to grab every business opportunity, instead of really doing my due diligence before I acted (this got me in trouble on more than one occasion).**

**I struggled to just BE with people's complaints – my clients and employees – without feeling as if it were up to me to fix them. And I rarely (if ever) asked for clear contract terms with my clients and employees... because I was secretly afraid that if I did, they wouldn't want to work with me anymore.**

**I didn't think I needed things like legal agreements, or I tried to get them in place as cheaply or as quickly as possible, thinking they didn't really matter because I only did business with people I trusted, or that I didn't have much to protect.**

**I was terrified to invest in myself and my business.**

**Once I started making money, I was sure that my team members were only working with me because of the paycheck and not because they really believed in me or what we were doing together.**

**I had no idea how to look at the numbers of my business -- my time, the money I was making and spending, or to set clear goals based on the time I had available and the money I wanted to make.**

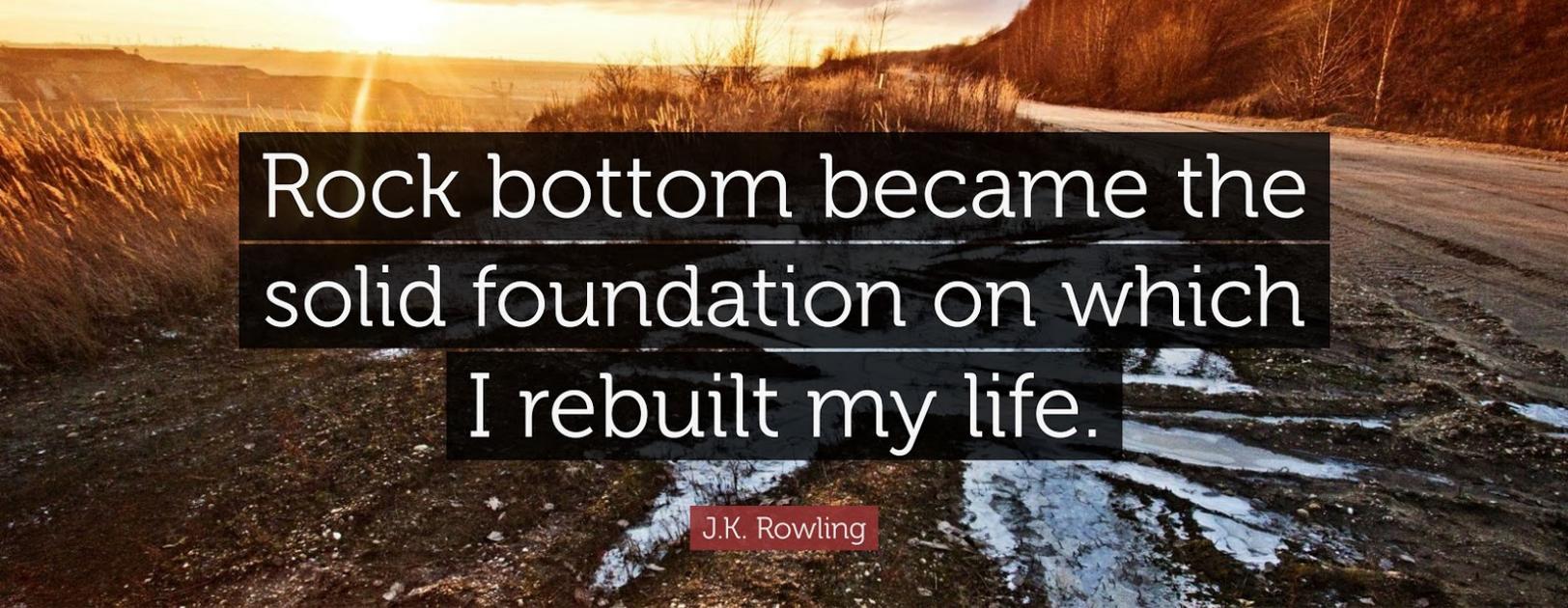
**I wasn't building my businesses with my eyes wide open, with trusted advisors by my side. Usually I was terrified, eyes squeezed shut, focused only on how much money I could make, rather than on whether my business was leading me to be more of the woman I truly wanted to be in the world.**



Today, I can see clearly that all of that was a sign of my money dysmorphia and lack of understanding around legal, insurance, financial and tax matters. And it led to repeated short-sighted decisions that ultimately got me into a rock bottom reality, even though I had everything I needed to not have to go down that road.

## **DEFINE MONEY DYSMORPHIA**

Money Dysmorphia and a lack of understanding about legal, insurance, financial and tax matters led me right into rock bottom and giving up on being a business owner, even after building two million dollar businesses -- this does NOT have to happen for you.



Rock bottom became the  
solid foundation on which  
I rebuilt my life.

J.K. Rowling

**If you are at rock bottom now, know that it's not the end of the road. It can be the solid foundation on which you rebuild the rest of your life. And, if you are not at rock bottom yet, keep reading so you never have to get there. When you see where Money Dismorphia may be operating in your life, you can make the choices that result in you never having to get to rock bottom, or even close. You can remain on a trajectory that we call an "upward spiral" and keep creating exactly the life and income you want, doing your Great Work in the world.**

I only wish I had known then what I know now... how to hire the right advisors, how to enter into legal agreements properly, how to track my financials well, how to make wise hiring choices, how to decide what to invest in when and with whom, and how to plan for my taxes and keep them as low as possible.

The worst part isn't all the money I lost along the way, but the lost time, the lost impact and the lost relationships. My mistakes set me back at least 10 years.

And, while I trust the timing, I really don't want to see you end up in the same boat, making the same mistakes. Frankly, we cannot afford it. The world needs you and your Great Work now. We can't wait ten years for you to figure this out!

As a business owner with a brand, an image, and a huge ego, bankruptcy was my ultimate humiliation, and could have become the validation of all of the ways I really did suck. I could have let that experience ruin my life, and be the reason I left the world of business forever.

But it turned out to be just the opposite.

**I used bankruptcy for the purpose it's designed – to provide a fresh start. But it took becoming willing and able to see what I had been blind to before.**

I got to see all the ways I had been building my businesses with my eyes squeezed shut, and as a result I was able to make a shift and learn that there is a better way. Consequently, I am now able to do business – awake, aware and on my own terms, for real. And you can do this too.

Eventually, with a solid LIFT (Legal, Insurance, Financial and Tax) Foundation beneath me and with the right partners and advisors by my side, I discovered that there is a way to be in business that is good, and true, and beautiful. And I was able to rebuild – stronger, more internally secure and more successful than I could have imagined. But not without learning a few very painful lessons first!

Today, I am the founder of three thriving businesses, one of which has been on the Inc. 5000 list for three years in a row. I was named by Entrepreneur Magazine as one of the 100 powerful women in 2020, fighting for a better future for my work in the legal industry. And most importantly, I no longer suffer from impostor syndrome, or wonder if I'm on track, on path, or on purpose. Surprisingly, the path back from bankruptcy, humiliation, and never feeling good enough, was as a result of waking up to see what I've identified as "money dysmorphia" and everything you'll read about, here in this Manifesto.

As I began to share what I learned during my dark time of discovery, among my own small circle of friends and elite mastermind partners, I discovered what I was experiencing was not unique. However, it was something people weren't talking about – because these are the types of things that bring up a whole lot of guilt, shame, fear, and downright embarrassment.

**Most people simply suffer in silence and may never get the support they need.**

Many come to the end of their lives with regrets, knowing that despite their high-achiever drive (and even some impressive external results), they never truly got where they hoped to go... they never realized their full potential.

I knew the only way I could bring these things out into the light in full integrity, was to begin by breaking my own silence first, so you could see the truth behind the scenes for yourself, and reap the rewards of waking up, without having to be forced into it, like I was.

Becoming aware of our blind spots is never easy. From what I can tell, it's usually a force or choice kind of thing. You will either be forced into awareness through a series of events that make it so you cannot ignore the issues (such as sickness, lawsuits, or other crises).

OR, you will choose to wake up and see what's here for you, so that we can create a better world, together.

Force or choice... I hope you choose, because it's way more pleasant than force.

For me, it took force. I'm stubborn, what can I say?



I've put together this Manifesto for you, my LIFT educational course, and trained lawyers and advisors to serve you so you are able to have the eyes wide open guidance I wish I had along the way.

So, while you may know me because I've...

- Worked with some of the “best in the business,” including: Lisa Sasevich, Marisa Murgatroyd, Kendall SummerHawk, Ali Brown, Dave Dee, Christine Kloser, Melanie Benson Strick, Amy Ahlers, JJ Virgin, Allana Pratt, Charu, Marisa Murgatroyd, Bill Baren, and many more.
- Been featured on radio and television including on The Today Show, Good Morning America, Nancy Grace and many well known podcasts.
- Or you just know me as that girl in the community with many names – Ali Shanti and Alexis Neely, in the past, and now my finally and forever name, Ali Katz – and didn't even know any of that other stuff!

What you may NOT have known (before reading this Manifesto) is that I also...

**...have built four entrepreneurial ventures from scratch and turned three of them into 7-figure businesses.**



# A Quick Summary of My Successes and Failures

- **Sold my first business, and watched the buyer run it into the ground within 6 months of taking over – leaving me \$250,000 in debt**
- **Was hit with an unexpected 6-figure tax bill and sued by an employee I thought I had a great relationship with**
- **Spent hundreds of thousands of dollars hiring coaches and mentors – many of whom had me looking in all the wrong places – while ignoring some major red flags.**
- **Filed bankruptcy, and rebuilt everything from scratch**
- **Made more than a million dollars of mistakes along the way and then woke up and turned it all around...**

Fortunately, I learned some powerful lessons from these mistakes that allowed me to bounce back quickly – and today one of my companies is earning \$5.5M a year of revenue, was just valued at \$15,575,000 by an outside valuation firm, and I am about to have my first successful partial exit from a company I built, and I'm an investor and a thriving CEO and teacher of a body of work that serves millions.

(Plus I now have the freedom to work from wherever I want, travel as much as I choose, and enjoy a lot of time with my family... which I can assure you, was not always the case!)

And now, the best part – and in many ways I do believe the underlying purpose for all of these experiences – is that I get to share it with you.

My sincere hope is that this Manifesto will help you see more easily than I did, so you can make decisions more wisely than I did – and save yourself a boatload of time, energy, attention, and money by creating a real deal, eyes wide open life and income... starting now.

# The “Dirty Little Not Talked About, Taboo of all Taboos, Secret” Of Business

It’s time to talk about the last of the truly taboo subjects...

So taboo, your friends and colleagues aren’t talking about it. So taboo, there are no teleclasses or interviews about it. So taboo, you probably won’t even find articles or blog posts or much of anything about it on the Internet.

This is the ONE thing that separates those who are truly and actually “woke” and earning money with ease and grace using their gifts, talents and service – from those who have, what I call, **lives and businesses operating in the dark.**

**So taboo, you probably won’t even find it talked about in articles or blog posts or much of anything about it on the Internet.**

## **What does it mean to be operating in the dark?**

Now, let me be clear ... when I talk about people operating in the dark, I don’t mean they are bad people, dark or evil, or that they are trying to take advantage of anyone.

Far from it. Most people operating in the dark are the nicest people you’d ever meet.

And for the most part, they look great in the public eye. But when you take a peek behind the curtain, what you'll discover is a shadow – a hidden secret that could show up in a few different ways.

One, that I've seen quite consistently since I've gotten to get behind the scenes in the lives and businesses of many notably successful people in the business world, is that there is no (or very little) “business behind the business.”

There's often simply no foundation at all.

What many of the most “successful” business owners have built, is basically a glorified job – even if they have employees and lots of revenue coming in – with a tremendous amount of risk.

So, it's the worst kind of job. No benefits, no vacation or retirement plan, and often times very little leadership.

People operating in the dark often:

- Have lots of bosses (customers) who they sell their products or services to, but little consistent cash flow they can count on, so there's constant stress, strain, and scramble.
- Provide a good, or even great service and look great from the outside... but behind the scenes, they're a mess.
- Make spending decisions by logging into their accounts to see how much they have in the bank.
- Don't know what's making them the most sustainable money (and thus what they should be focusing on) OR what's draining their business (either of money, time, energy or all three).

# Business owners operating in the dark don't really have a plan.



- Have no protection if something were to happen (i.e. getting into a conflict with a customer, vendor, team member, or partner... getting sick... running into a short-term cash flow problem... having merchant account or banking issues... or worse, getting sued).
- Have no Plan B... unless Plan B is finding a job. (In more cases than you can imagine, if you haven't set up your business right, your Plan B could even be impacted by not having LIFT protection in your business. I've seen plenty of business owners who went out of business and their business creditors came after their future paycheck. Ouch.)
- Don't have a sustainable exit plan. (You might think you want to do the work you are doing in your business now forever, but if something changes, wouldn't you like the option of being able to sell your business and benefit from all this work you've put into it?)
- Are secretly terrified – and either drinking away the pain, self-medicating with marijuana (or adderall, or even harder drugs) or working themselves to death.

The worst part? You KNOW these people. (You may even be one yourself.)

They are often the ones that have a great online or social media presence. They're the ones you've heard about, watched, and maybe even envied. They may even be helping a lot of people with their work.

But look deeper, and they are floundering along – at risk of crumbling at the first sign of trouble.

Far too often, people who seem to be playing a big game, really aren't. Not big in the context I am talking about; it just looks like they are, on the surface.

In reality, they are hiding the things they don't want you to see in the shadows, where they themselves haven't even been willing to look.

**When the public image is very strong, it is often hiding a big, hidden underbelly, which we will come to understand as the shadow.**

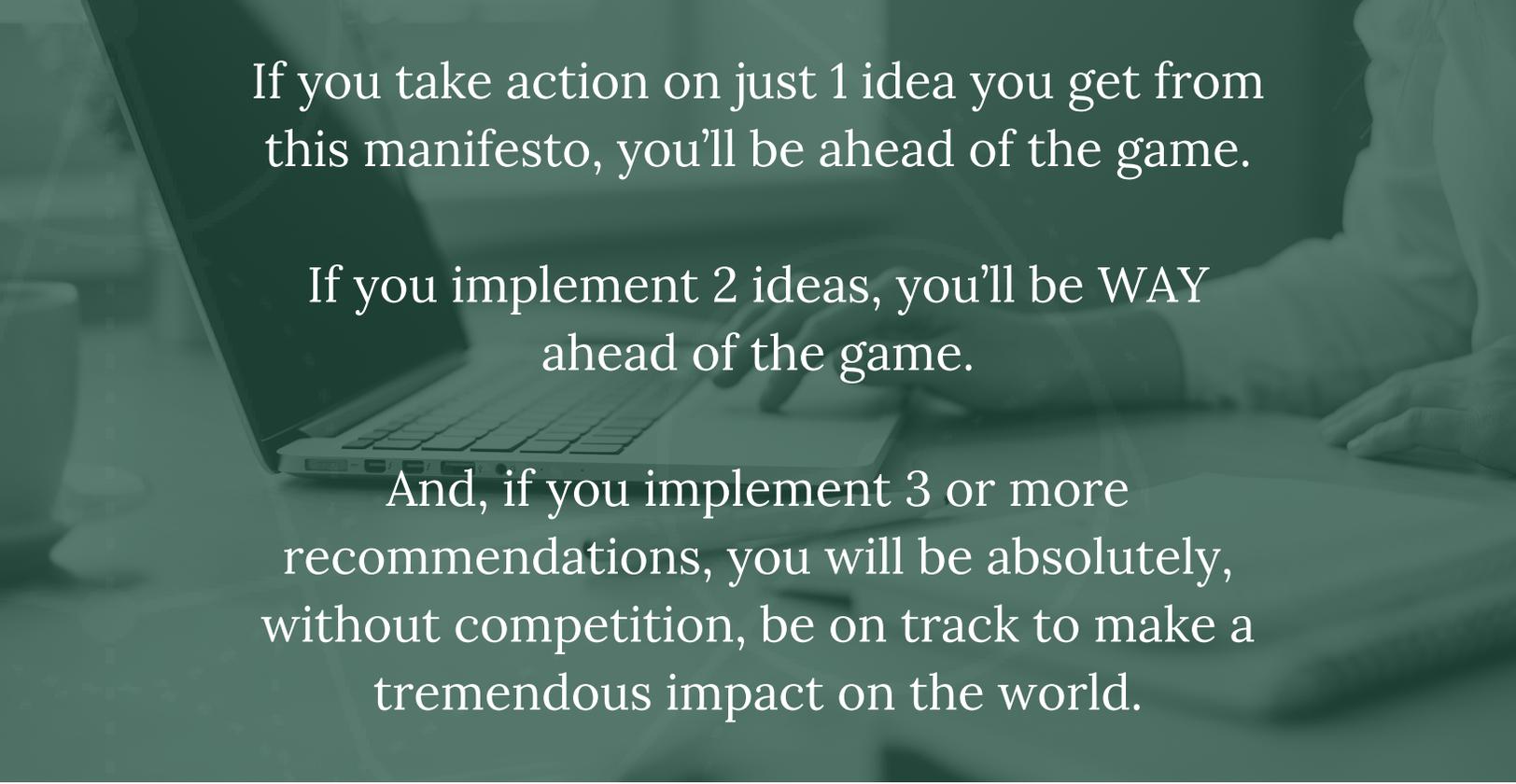
And here's the thing, when you learn from anyone (online or offline)... if they are not aware of their shadow, you are likely to take it on and make it your own.

In contrast, if you are learning from a teacher who is aware of this shadow, and speaks to it, you can learn from his or her mistakes.

I can speak to all of this because I was operating in the dark myself for far too long – and I paid the price, mightily.

So, if I'm speaking to you and you are starting to get scared, just know this – it's not too late to truly wake up and turn it all around. If I could, you can too. And I do believe it's the common purpose we all share.

Here's the good news: Simply by reading this Manifesto, you are at a HUGE advantage.



If you take action on just 1 idea you get from this manifesto, you'll be ahead of the game.

If you implement 2 ideas, you'll be WAY ahead of the game.

And, if you implement 3 or more recommendations, you will be absolutely, without competition, be on track to make a tremendous impact on the world.

How do I know? Because most people will do nothing. So if you do anything with what you learn here, you are WAY ahead of the game.

Maybe up until now, you know you haven't been doing as much as you can or should, from a "take your work in the world seriously" perspective. But that's all about to change.

If you take what you learn here and apply it to your life and work (whether you are an entrepreneur, intra-preneur, independent contractor, freelancer, professional service provider, or even a straight up employee) – and find the right combination of advisors and inner guidance to support you along the way – you could not only make a fortune, but finally find your deep down, feels really good, absolutely secure no matter what - freedom. We experience it as liberation.

Wouldn't that be great?

If so, let's get started...

# Sink or Swim: My Crash Course in Entrepreneurship

The next 20 pages are a look into my personal journey, and all the hard lessons I've learned to bring you this wisdom. Starting at page 46, I share your next steps, so you don't make the same mistakes I made.

When I started my law practice in 2003, I knew NOTHING about business at all.

After just three years at the BigLaw firm, I had been bit hard by the entrepreneurial bug and made the commitment to go out on my own, after talking with a couple of other women who were successfully running their own law practices while raising kids.

(Every business move I've ever made was made with the courage of seeing another woman I believed in, do it first. And it's why I share my journey so publicly. If I can, you can.)

I hired a coach, but he was more focused on how to set up a traditional law firm, than on how to run a business that would also allow me to be a great mom to my kids and feel great about the work I was doing with my clients. And as I discovered later – much to my dismay – there was a big, big difference between the two.

I gave up the security of my 6-figure paycheck at the most prestigious law firm in Los Angeles, maybe even the entire United States. My kids were 4 years old and 6 months old and my husband was a stay-at-home-dad.

**Everyone was depending on me. It was sink or swim.  
So, I swam. Hard.**

The first two years of my practice, I floundered around and did a lot of on the job learning about how to get my phone to ring, what to say when it did ring and how to turn prospects into clients once they made it into my office.

I learned to face a lot of painful rejection.

Years one and two were all about figuring out how to generate clients and revenue.

I gave very little thought during that time to the business aspect of things. I was grateful to just pay my bills!



I entered into agreements, signed leases, invested in my business, financed Equipment and a whole office build-out, and made a whole host of other decisions with absolutely no business training whatsoever. And with very little guidance.

**I didn't know who to ask. Or what to ask, for that matter. I was winging it big time.**

**The first terrible, horrible, no good decision, happened when I set up my financial systems (or maybe I should say didn't set up my financial systems).**

My first bookkeeper was my sister. She sat across from me at my desk in my office and set up QuickBooks on her computer so she could keep track of my finances.

My sister is NOT a bookkeeper. And, back then, she was terrible at managing her own finances. I have no idea what made us think she'd be a good bookkeeper--maybe it was that she's good at math?! But, she was there and I needed someone, so it seemed like a good idea at the time.

I figured it would be as basic as recording what came in, and what went out. Simple, right?

It wasn't. It set things up with the wrong foundation right from the beginning.

The next bad decision came when I hired a CPA and she didn't take the time to explain to me how to set up my chart of accounts. I knew this was a big deal, but every time I tried to talk to her about it, she said to me, "There are lots of different ways to set up your chart of accounts. There's no one right way. It depends on what you want to know."

But, I didn't know what I wanted to know... I couldn't even ask the right questions.

**I knew there were some financial reports I should be looking at, but I wasn't sure what they were – and I definitely didn't know how to read them!**

Note: if you're not sure how to set up your chart of accounts, and how to know it's set up correctly for your type of business, the FIRST thing you need to do when you put down this Manifesto is sort this out in your own business.

Begin by asking your bookkeeper to send you an up to date, reconciled P&L statement for the last month, 3 prior months and year to date. And, if that isn't possible because you don't have a bookkeeper or your books aren't reconciled to the last month, you definitely want to task rapid action on the offer I have for you at the end of this Manifesto ... it's time to get you in the know, get your LIFT systems set up and get you confidently running a business you can count on.

Because my chart of accounts wasn't set up properly, income and expenses were not being coded to the right categories. This meant that any reporting I was getting on my P&L statements was meaningless. (Not that I was even getting reports back then; but, if I had been, they would have been meaningless.) Worst of all, I wasn't deducting all the expenses I could.

**Because my chart of accounts wasn't set up properly, income and expenses were not being coded to the right categories. This meant that any reporting I was getting was meaningless.**

I had no idea how important it was to have my financial systems set up so I could "read the health of my business" using them.

During this time, I hired a woman who came in as my office/business manager, Nancy. Nancy was both a blessing and a curse.

She was a blessing because, right when I figured out how to attract clients and get hired consistently, Nancy began to handle all of the business type stuff for me that I wasn't any good at. The stuff that makes up, what I call, your LIFT Foundation, but back then I had no idea what it was.

**I just knew Nancy handled the “hard” parts of the business.**

(If you’ve ever wished you could just hire someone to take care of “all that stuff,” listen up. You can absolutely get support to set all of your LIFT systems up. But avoiding learning the foundations of what YOU need to know about the Legal, Insurance, Financial and Tax aspects of your life and income altogether – by trying to blindly hand them off to someone else – can get you in BIG trouble, as I was about to discover.)

Nancy did my books. She set up my employee policies and procedures. She hired. She fired. She dealt with the banking and payroll and taxes and receipts and records. Insurance. All of it. Ahhh ... that was nice.

Really, it was great. Until Nancy decided it was time for her to leave. Right in the middle of the most ugly part of my divorce.

It was 2005. At that point, I had put a tremendous amount of effort (and investment) into learning everything I could about the sales and marketing part of my law practice – and I was on track to do right around \$500,000 of revenue that year. My husband wanted the business valued because he wanted his piece of it as part of the divorce.

And while I was bringing in great revenue, I hadn’t figured out how to manage the money, and I always felt broke.

I was going to yoga four times a week, and spent pretty much every minute of every class running numbers in my head to try and figure out if I would have enough money to cover the bills. Down dog – add up the income, slide forward to plank – subtract the expenses. Chatarunga – Would I make it? Up dog – Or would I go under?

Over and over again. I was constantly stressed out.

Yes, I was making a lot – but I was also spending most of it trying to figure out how to keep my life and business going.

Nancy let me know near the end of 2005 that she was leaving. In a month. But, she assured me she would find me a great bookkeeper and transition everything over.

The bookkeeper she found was not good. Not good at all. But, I didn't know that. (Okay, confession: I did know. I knew and didn't want to face it. I simply couldn't deal with it. And I didn't know just how important it was. I thought it would be fine as long as I kept making the money.)

So, this new bookkeeper took things over. Our chart of accounts was still out of whack, which meant expenses weren't being categorized properly, or at all. And all of my income was lumped into ONE category, law firm income. I definitely wasn't getting any type of regular reporting.

I made buying decisions by pulling up my bank account online, seeing if I had money and if I did, spending it.

Sound familiar?

That was all fine and good, except when there were unexpected bills. For example, there was one month my bookkeeper missed the payroll tax payment. Oy. Should have been a big red flag. Back then, this was about \$6,000 per month.

(Yes, my payroll was way over inflated because I didn't know how to put together a good team so I just kept hiring more and more people without ensuring that the people I had already hired were properly trained.)

So, when the \$6,000 payment was missed, I hadn't taken that into account in my spending calculations. Ruh-roh.

**This should have been an early warning sign that I needed to get a handle on my finances. But, I didn't. Instead, I just focused on bringing in more revenue.**

Warning sign number two came when the forensic accountant we hired as part of our divorce to value the practice said to me, "Alexis, your books are really messed up."

I nodded and cringed and ignored it – though deep down, I felt like a fraud.

I continued to focus on bringing in revenue because I thought that's what my job was. If I could just bring in enough revenue, I could buy my way out of any problems, right?

I didn't realize how important the Legal, Insurance, Financial and Tax (LIFT) side of my law practice was – and how my failure to face the reality that I had NO IDEA what was going on with any of that, would eventually impact my life and business.



**This should have been an early warning sign that I needed to get a handle on my finances.**

I was making money and I thought that was all that mattered.

So, I kept avoiding the hard things. I wasn't even incorporated during this time. I was told by my CPA I didn't need to because I was a lawyer and couldn't use the corporate form to protect my personal assets from legal malpractice.

(Um yes, that's true, but I could have used the corporate form to protect me from other risks – like employee lawsuits, employees' actions, agreements, investments, etc.)

And, she said, I wouldn't have any tax savings from incorporating anyway. I guess she didn't believe me that I'd build a thriving practice because if she had, she would have known that incorporating and being taxed as an S-Corporation would have saved me many tens of thousands in self employment taxes.

I didn't even have the right kind of insurance in place to protect me in the event that I was sued by an employee, or anyone other than a client. I thought all I needed was professional malpractice insurance, and I wasn't aware that there were other kinds of insurance I should have been considering.

## **Making Millions... But Missing the Big Picture**

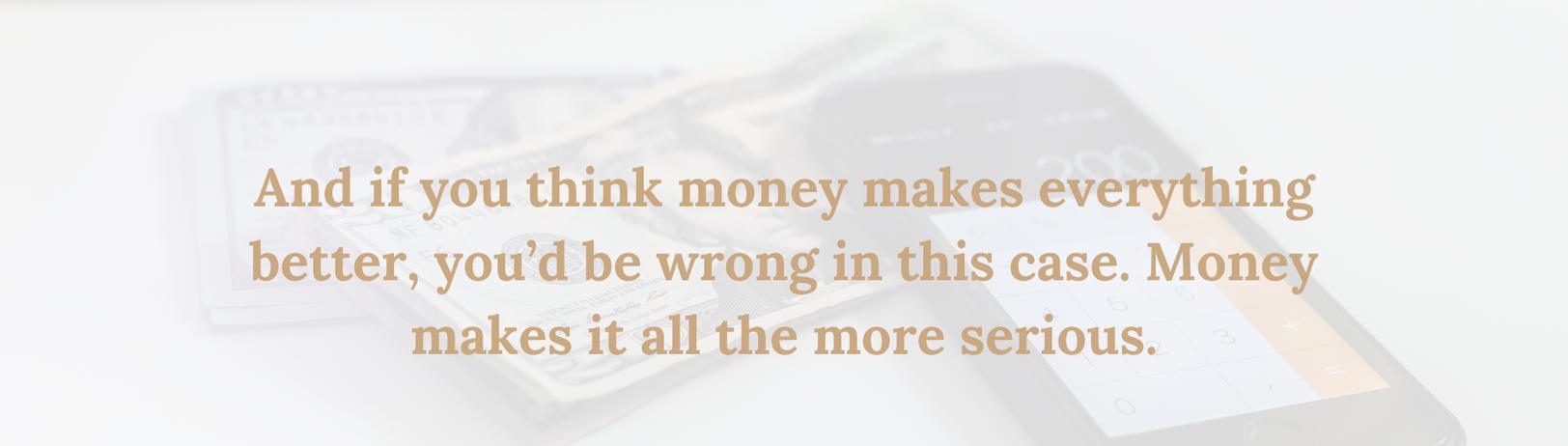
2006 was the year it all came together, and at the same time – in many ways – it all began to fall apart. It was the year I hit a million dollars in revenue for the first time. What a feat!

**If you think money makes everything better, you'd be wrong. Money just amplifies what's already there. And that meant a big mess for me.**

It finally began to sink in how important the LIFT Foundation (or lack thereof) was in my business in April of 2007. Tax time.

And, I had a \$116,000 unexpected tax bill to pay.

Unexpected, meaning I hadn't set aside the money to pay the bill, and I had been reinvesting and spending everything that had been coming in. (With proper, proactive tax planning, entity selection and monthly categorization of our expenses, that bill would have only been \$50,000.)



**And if you think money makes everything better, you'd be wrong in this case. Money makes it all the more serious.**

Fortunately, back then, borrowing money was as easy as having a good credit score and a social security number. And I had done one thing right – I had developed a very good relationship with the President of my local business bank. His name was Bob.

I called Bob freaking out about the tax bill I'd have to pay just two days later and he got me a loan. Phew, crisis averted. Sort of.

I fired my CPA and bookkeeper and found a new team I hoped would be able to help me get control on the business of my business.

The new team was marginally better than the old one. They did everything technically right, but they still didn't help me understand how to make decisions based on my numbers.

I didn't recognize that what I really needed, was someone who could help me look at the big picture and understand what I needed to do to straighten things out. Redo my chart of accounts, make sure I was getting monthly P&L reports that I could compare and use to predict the future.

**No one was looking at the big picture with me because I didn't know what to ask, and that I could even have that kind of support.**

That's why I've made it my mission to ensure other business owners can get the support they need – so you don't have to go through the darkness on your own, the way I did.

More on that later. For now, let's get back to the story...

## From 7-Figures to Deep in Debt (A Lesson in Self-Sabotage)

In 2007, I began to think about selling my law firm.

By that time, I had started my second business and it was on track to make 7 figures. I could do it from home, and it satisfied my desire to make a difference on a big level, beyond the 1:1 of seeing clients in my office.

But, I didn't have any good solutions for who would take care of my clients.

The other lawyers who were seeing clients in my office were moms and a dad who didn't want to own a law firm – they just wanted to see clients. And every other lawyer I knew who might have the wherewithal to buy the firm, was operating under the old, outdated way of practice that I knew didn't really help their clients.

If I was going to sell my law practice, it had to be to someone who would take care of my clients in the same exact way I envisioned, as a trusted advisor, not just a document preparer. I had built a unique business model and I was unwilling to sell the firm to someone who would not implement it.

So, I kept the practice going. Truthfully, I held onto it for too long because of my loyalty to my clients and my employees. (Big warning sign! If you find yourself doing something for someone else, really look at it and determine whether you may want to make a different decision.)

**And then I blindly sabotaged it all – though I had no idea that’s what I was doing at the time...**

In January 2008, I stopped seeing any new clients so I could focus on finishing my book. Around that time, one of the lawyers I had trained in my online training programs came forward and expressed interest in buying the firm.

I jumped at the opportunity.

I was so excited that I was going to sell the firm that I didn’t look too deeply at whether he was the right buyer. Big mistake.

No credit check. No reference check. No background checks. No nothing.

I just said, “Okay, you want to buy the firm and you say you’ll follow my model? Great! Let’s do it.”

I was avoiding seeing reality. (In other words, I had my eyes VERY much squeezed shut.)

The reality was that my deep-down-insecurity had me grab at the first opportunity, rather than recognize that what I had built was valuable and deserved a real search.

This man was 70 years old. Very sweet. Very accommodating. But, not going to be able to build on what I had created.

And I could have seen that – had I been willing to face my own insecurities and look at what I didn't want to see.

It turns out he had no financial resources at all to support the growth of the firm. He was unwilling to invest any money to continue the marketing systems I had put in place. And, he expected the firm revenues to finance the purchase, even after he stopped spending money on marketing. Gulp.

**I was so excited that I was going to sell the firm, that I didn't look too deeply at the buyer. Big mistake.**

**With the right guidance, I would have seen the writing on the wall, before it was too late.**

Without it, I didn't see (or didn't want to see) what was right in front of me until about two months after we closed on the sale.

The buyer made a couple of big errors in judgment on customer service issues that ended up costing the firm nearly \$30,000 in revenue.

Within 3 months, he had fired the marketing director (he didn't understand why we needed the expense) and stopped paying most of the rest of the bills.

By January 1, 2009, I had to make the incredibly painful decision to take back the firm from him, and as gracefully as possible close it down in such a way that the clients would be taken care of, and the employees would be paid. Despite everything that happened, the firm had generated \$700,000 in 2008.

But even with that, I got stuck with nearly \$250,000 of debt during the process of closing down the practice (because I wanted to do the right thing, not take on any new clients I knew I wouldn't be around to serve, and ensure my existing clients and team members would be well cared for after I took on all of that debt, personally.)

**The lack of LIFT Foundation in my law firm resulted in an asset that should have been sold for at least \$500,000 turning into a \$250,000 liability.**

OUCH.

And that was just on the financial/tax side of things...

## **On Setting Boundaries and Being Sued**

The legal/insurance side of things was just as bad.

I mentioned earlier that my business was not incorporated. I did rectify that in 2007, thankfully. But, what I never cleaned up or dealt with properly, was my employment policies and procedures.

**I wanted to be a cool, flexible, accommodating boss.**

Boundaries? I didn't believe in boundaries. I thought they were just for people who didn't trust. (Huge error that I would have seen with the right guidance and a willingness to see.)

I trusted everyone who worked for me infinitely, and saw the highest potential in each one of the people on my team. As long as they got their work done, I didn't care when they worked, how long, how often, or where.

The only time I made anyone keep track of their time was when I was working with one of the many consultants I hired to help me get a handle on the business side of the business, and they said everyone needed to track their time for two weeks.

So I had them track their time, did nothing with the information, and they likely thought, "There's Alexis doing one of her crazy things again that's making it harder for us to get our work done."

I had no idea what I was doing when it came to managing or leading people! But, the work was getting done. And we appeared to be making money.

I brought in all sorts of consultants to try and help me – one gal worked with us to facilitate group discussions and team communication. Another one tried to help me establish clear job descriptions for everyone. Another tried to get an employment manual in place.

**What I really needed was a kick in the ass from a trusted advisor.**

(Ideally a lawyer, like the kind I now train so you don't have to make these same mistakes in your business!)

**I needed someone who would tell me:**

"Alexis, what you need is clear boundaries between you and your employees. You are not friends. You are the boss. You need to set clear expectations of

success, what the objectives are for their jobs and what they need to do each week and month to fulfill the needs of the firm and your clients. Then, you review their work on a weekly and monthly basis – and if they are not meeting their success objectives – you fire them. Fast.”

But no one told me this. Or if they did, I couldn't hear it.

It all came crumbling down when I discovered my team members didn't like me. They didn't care about me at all. In fact, at least one of them hated me.

Of course they did. I hadn't set them up for success.

**I trusted everyone who worked for me  
infinitely and saw the highest potential in  
each one of the people in my team.**

Unfortunately, this happens to business owners every day.

Perhaps you heard about the scandal surrounding Miki Agrawal, the founder and CEO of Thinx? Here's an excerpt from a March 2017 article at qz.com...

“The controversy surrounding Thinx founder Miki Agrawal—which began when Racked published an exposé portraying a toxic workplace culture that spiraled into allegations of sexual harassment—has already become a case study in mismanagement. Thinx sold a lifestyle to its mostly millennial employees: the perfect trifecta of work/purpose/ play. Agrawal cast Thinx—high-tech underwear for women during their menstrual cycles—as a socially conscious product with a feminist mission, and crafted her image to reflect that.

She saw breaking taboos as part of her brand and oversaw what employees describe as an unregulated office environment in New York City that reflected her tastes. And it appears that Thinx could get away with it as long as her employees—mostly women— were willing to put up with subpar pay, benefits, and working conditions. For a while, they did, until one fired employee sparked a wave of complaints. Ten of Thinx’s 35 employees have reportedly quit since January, its board launched an inquiry into Agrawal’s behavior, and she stepped down as CEO.”

I happen to know Miki personally and she is not the monster she has been made out to be, at all. Miki is a kind-hearted woman with a big vision and blind spots to match, who I know believed she was empowering her team to be the best they could, while at the same time not seeing the huge red flags that would have shown her exactly the opposite was happening.

**People actually want clear expectations and boundaries. But I had no idea how to set them. I just wanted to be liked. And successful.**

I even convinced myself that I was doing it all for them.

I can see now how that belief, and my inability to see and my lack of a trusted advisor who could take me by the hand and show me, got me in huge trouble.

I discovered one team member’s hatred for me after I spent months helping her write a business plan and launch her own business--because I knew I’d be phasing her position out of the firm, and outsourcing what she had been doing at the firm full-time.

She was a single mom, like me. I cared about her. A lot. Even to the point of sending her kid to summer camp and bailing her out of jail when she was arrested for driving on a suspended license.

I hated the idea she would be out of work, and because I believed everyone could be an entrepreneur, I gave her hours and hours of my time to guide her to set up her own business.

Now, with experience, I understand that not everyone is meant to be an entrepreneur – though everyone can have the sovereignty of working for themselves. Some people are a better fit as freelancers, intra-preneurs, or independent contractors. But, back then, I was sure everyone could and should run their own business.

One day in April 2008, I sat down next to her at her computer and noticed she was hiding something in her email.

**That night, I went into her email account and for five hours read message after message from her to friends and family members about how much she couldn't stand me.**

Not to mention there was no way she could have been doing much work, based on how many emails she was sending throughout the day. And of course all that time, she told me how swamped she was and how hard she was working.

I also saw emails in which she had shared confidential information about the sale of my firm with a woman who had at one point applied to buy the firm and then later backed out. (In fact, it looked like they were collaborating to sabotage the sale.)

Worst of all, she had been stealing my firm resources to do work for other clients on the side, despite the fact I was paying her a salary guarantee specifically because she told me she couldn't get other clients – and I wanted to make sure she made enough money to support her family.

**It was painful. Terribly painful. And I handled it all wrong.**

Instead of calling my lawyer (because I didn't have a lawyer I trusted), I handled it myself, walked in the next day and promptly fired her. She was pregnant.

Within three months, she sued me. And was represented pro bono by a family member (shockingly the same one who had previously worked for me and applied to buy my firm).

It turns out I didn't have the kind of insurance that covers employee lawsuits. I had to plunk down \$10,000 just to hire a lawyer to respond to the lawsuit.

Ultimately, even though I believed I was in the right, I had to pay out a five figure settlement because I couldn't afford to defend the litigation. And, of course, I had no records that proved she had taken plenty of breaks, was operating as an independent contractor (not an employee), and was not working overtime, as she claimed.

The bigger and more in the dark you are, the harder you fall.

The longer you wait to get a LIFT Foundation in place, the more painful it will be when you are finally forced to deal with it, as I was – again and again and again.

# Client Success Spotlights:

## *Integrity Over Winning - A New Paradigm for Addressing Conflict*



"Over the last 13 years, we've had thousands of clients. And although we've had a handful of challenging client situations, none has been more challenging than the client that we're dealing with now. I wasn't sure how to handle it, so I called around to get advice from several attorneys. Every attorney I spoke with thought our client was a bit crazy, and assumed I was calling to see how I could get this client to go away as quickly and quietly as possible.

Alexis operated within a totally different paradigm. She asked a lot of questions before giving advice. And, the first question she asked after she heard an account of what happened was: "What is the outcome you want?" Seems like such an obvious question, but none of the other attorneys I spoke with asked me that (because they were operating inside the paradigm of "How do I help you win and make this pain-in-the-ass client go away").

Alexis' paradigm was, "Within conflict are great gifts and the potential for huge growth. Let's uncover those gifts, and handle the behind-the-scenes aspects of your business with the same integrity that so many of us leaders say we live by." This was exactly what I was looking for. An attorney whose values match the values that we've infused into our incredibly beautiful and powerful community of coaches and holistic practitioners.

**I have seen in my own life that if I don't get the lesson the first time, it will likely revisit me in another (possibly more challenging) form.**

I was committed to extracting the lessons and growth from this situation, so I could leverage it to step into a new level of leadership and success. And Alexis was right there to support me.

Alexis was compassionate. I felt safe enough to express anything to her, and safe enough to discover my deeper truths. She was bold – willing to ask the tough questions and encourage integrity over „winning,” and compassion over being right. She did her best to truly understand me... and she also did her best to understand my challenging client... who she was, what her needs were, and what outcome she was truly looking for.

Alexis took into account the complexity of the situation and didn't try to take a hammer to a situation that called for a much more delicate instrument. She was a breath of fresh air, and gives me hope for the entire attorney industry.

Alexis understands the old paradigm of the court system and can help you navigate your way through it. But she also infuses your situation with a new paradigm that is based on integrity, compassion, listening, and truth. Working with her is like having an intuitive counselor, business coach, compassionate friend, and savvy attorney (all in one) on your side.

If you just want to hire someone to try to make your headaches go away, this kind of support may not be for you. But if you want someone who is interested in not only having your back, but also listening to your heart... if you want someone who will be in your corner, to help you grow through challenging situations and show up as the leader you say you are – Alexis is your gal.

**I hope Alexis is able to infuse the attorney industry with this new paradigm of addressing conflict. It may be one of the most important gifts the world could use right now.**

-Jesse Koren

Thrive Academy | Thrive-Academy.com

# How It All Ultimately Fell Apart (And Finally Opened My Eyes)

From the outside, everything still looked great.

By 2009, my name was becoming well-known. I was on TV and I had a ton of Twitter followers and Facebook fans. I was providing great services to my clients – and I did about \$2 million in revenue that year between my two businesses.

Inside though, my businesses were still a mess.

Attack after attack came at me to show me all the ways I was blind to the business side of business and to my own lack of consciousness. The Legal, Insurance, Financial and Tax structures I still didn't have in place kept coming back to haunt me.

**I felt trapped, lost, stuck... and like a total impostor.**

Ultimately I decided, “I can't do this anymore. What I built doesn't work. There's something I'm not seeing, and I don't know what it is. I have to wipe it all out, and start all over again, if I can.”

With the right advisor to guide me, I could have found a way to turn things around. But I didn't know how to find that guide, so I had to find my own way, and for me that meant a complete destruction.

In 2011, I finally gave up, threw in the towel, said “I surrender,” I suck at business, moved to a farm, and declared bankruptcy.

It was one of the hardest things I've ever done. And one of the most illuminating.

## As everything fell apart, the lights came on, and I finally opened my eyes to everywhere I'd been blind before.

What I saw is that – despite the fact that I got really good at sales and marketing over the years – no one had ever taught me how to:

- Look at my numbers, and understand the financial decisions that I was making
- Manage a million dollars of income and expenses.
- Set up contracts and agreements and establish boundaries and expectations properly.
- Protect my intellectual property in a way that I understood (I understood the mechanics of this because I was a lawyer, but I didn't understand why it was so important, or what could go wrong if I didn't do it – this cost me nearly \$60,000 after I had a friend develop a key piece of software for me, only to find out that I didn't even own the software and if I wanted to take it to another developer for maintenance or updates, I'd have to buy it from him for another \$40,000 on top of the \$25,000 I had already paid.)
- Be a true leader, with humility and dignity, as opposed to false bravado.

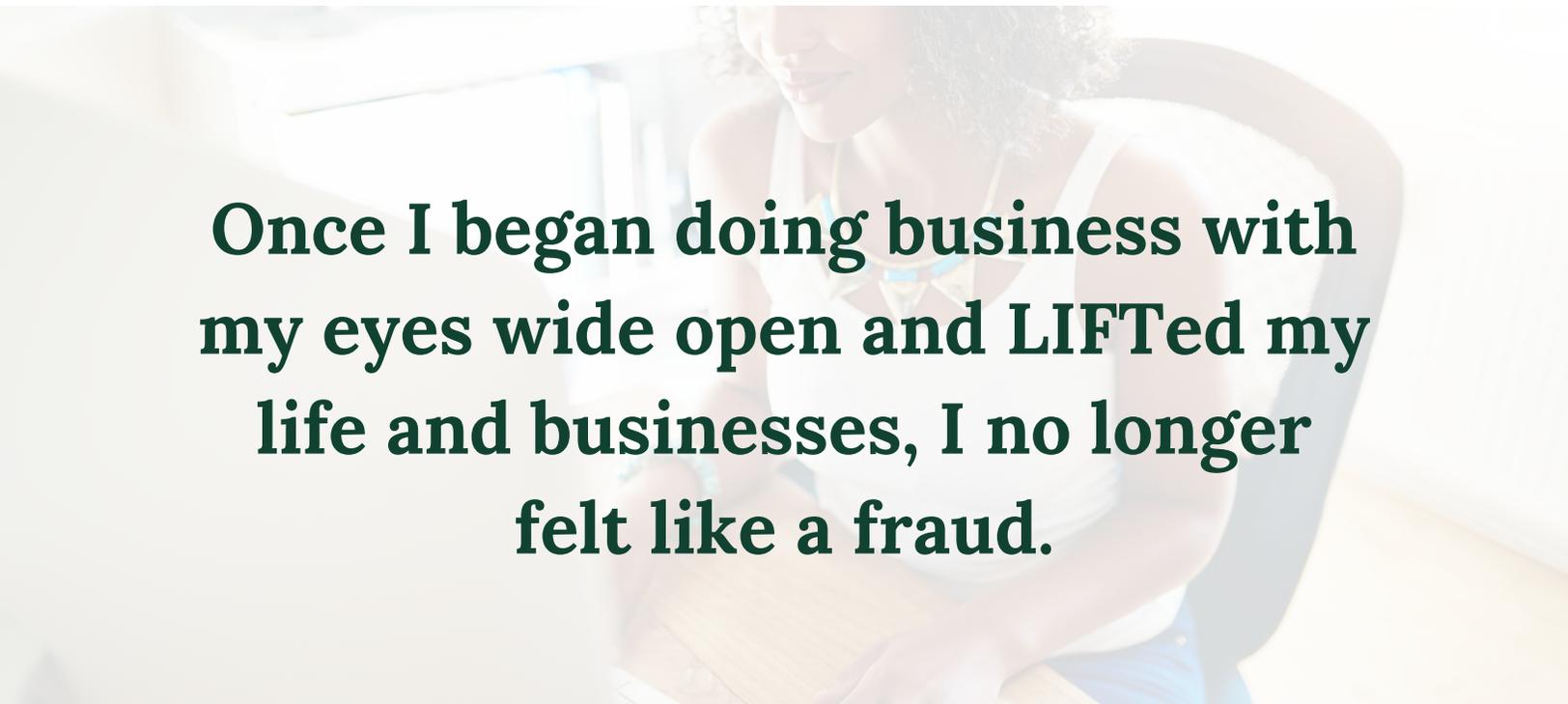
The one thing that I had learned in law school, was how to set up my business entities in the right way to protect them and me. Even though I didn't know how to run my businesses with the right legal, insurance, financial and tax foundations -- I did have great asset protection in place -- so when I went through the bankruptcy, I didn't lose the businesses I had built after I sold my law practice. (One small victory that I am incredibly grateful for.)

From the ashes of this destruction, the seeds of my life's work were planted...

# Soaring to New Heights, with a Solid Foundation

Coming out the other side of bankruptcy, I began to see that I had an ugly disease that many of us have, called Money Dismorphia. This dysmorphic view of my financial reality caused me to make poor decisions regarding how I used my non-renewable resources of time, energy and attention in service to money, which is infinitely renewable when you know how to earn it and take good care of it.

I knew how to earn it, but to take good care of it, I had to create an entirely new relationship with the Legal, Insurance, Financial and Tax areas of my businesses – which, with the help of some dear mastermind partners who helped me move beyond the shame of my many mistakes, I named the LIFT Foundation.



**Once I began doing business with my eyes wide open and LIFTed my life and businesses, I no longer felt like a fraud.**

It took everything I had to look at what I didn't want to see.

I stopped hiding behind marijuana, and realized I'd have to face my pain and confusion stone cold sober.

I got truly intimate with my financials, creating systems to help me see what I could not, before.

I turned to a trusted community to reflect back to me what I had not been able to see alone, and because I was willing to see what was hard, I could make the changes necessary to BE the change I always wanted to see in the world.

With support, I shined the light into the dark corners of my life and businesses, and as a result I could begin to live truly awake, aware and on my terms.

Ultimately, that has meant gaining an internal confidence and congruence that I had only dreamed of before.

Today, I can truly be all of myself, no compromise and no hiding. And this is no simple feat, as I still wonder if all parts of me will be fully accepted (because some of them are a wee bit strange by "normal" standards, even to me). But I recognize now that the more I love and accept all of myself, the more everyone else can as well.

With this newfound willingness to see what I couldn't (or wouldn't) and the alignment that has come along with it, I have restructured my life and businesses with eyes wide open – and this time as my impact and income has grown, I have been able to sustain it.

Today, Money Dysmorphia doesn't run the show. Thanks to the guidance I lay out in detail in the Enough Course, the Money Map and the LIFT Foundation Systems, I was able to create a foundation of knowing what Enough meant for me, and I was able to build my businesses on a solid foundation. What that has meant for me and the thousands of people I've helped to do the same:

- Cure money dysmorphia and build the right LIFT Foundations beneath your services and products, so you can step into your right role as a Creator of the Economy.
- Choose the right income model.
- Price and package services and products at the right price for a consistent, sustainable cash flow, that both relaxes the nervous system and has you knowing you are serving the right number of people, and earning what you need, when you need it on demand.
- Make a clear offer, which means having an intake and enrollment or sales process around your offer, and then Choose the right marketing strategies.

Once you've got confidence that you can make money offering your services and products, you can access the capital you need to build your own business on a sustainable foundation, and trust yourself to use the money that is available to you wisely.

Building a business that you can count on, that your family can count on, that does great work in the world, and creates your own economy -- so you can not just feel confident, but smart and wise, and be a great leader - requires you to make your decisions with your eyes wide open, meaning you are looking at your financials, finding the hidden resources available to you and deploying them wisely.

## Here are the foundational steps once you have your income model mapped clearly:

**Incorporating your business with the right legal structure, and separating your business and personal assets.**

**Hiring the right team members, at the right time, with legal agreements based in clear expectations.**

**Protecting your intellectual property, and then creating more with what you have, as a result.**

**Getting the right insurance, in the right amounts.**

**Establishing your financial systems so you can confidently invest in your business and one day have a proper harvest from your business, or if you plan to work until you die, at least be able to shift the energetic needs from you over time.**

**Get the government to subsidize your business by structuring your business to pay the least in taxes possible, as taxes are your biggest business expense bar none, but can also be your biggest opportunity to fund your business growth, when handled with your eyes wide open.**

This is the step-by-step path to making money with your services, earning what you need, and being able to fuel the economy of your life, your family and your community.

But here's the thing, you are not going to be able to do this alone. Nor should you.

Today, I feel incredibly blessed to have not one, but four streams of income that are truly thriving – and growing at their own perfect paces without unnecessary pressure from me – inside and out.

And, on top of it all, I'm a mom to two teenagers who I have a great relationship with.

How do I do it all?

By being willing to wake up to my Money Dysmorphia, face where my consciousness needed an uplevel, and then actually make the shifts inside of myself that were necessary to invest in my future wisely.

As a result, I am able to live with congruence and alignment that is the truth of who I've always known myself to be, but wasn't very good at living in the real world.

It's not enough just to call ourselves conscious people. It's time to actually be it. And, when you are, you will be amazed at what's possible for you as well.

Today, I'm able to recruit the best and brightest talent from large corporations, startup companies and even big law firms to work with me, and I only work 1:1 with people I respect and love, greatly, because I'm finally the leader I always imagined I would be.

It took LIFTing my life and business with legal, insurance, financial and tax systems and structures to get here.

In each one of the businesses, our financials are so clean that I LOVE looking at my numbers.

I get weekly reports that tell me the story of each business. We hold quarterly financial meetings, and I actually look forward to attending them. (And yes, I used to hate all of this as much as you might right now) and I was able to increase the valuation of one of my companies from \$250,000 to \$15,750,000, as a result.

I remember there were points in my journey where I used to think, “I’ve ruined my life, and I’m never going to make it back from this.” Without a solid foundation beneath me, I always had this sinking feeling that the other shoe was going to drop at any minute. And, it was!

When I implemented LIFT systems in my life and business, this feeling disappeared. Even in times when we were struggling to make it financially, it felt so good to be able to look at our reports, and know exactly what was going on and know I was making choices from a place of seeing rather than in the dark – so we could plan accordingly. No matter what happened, I always knew we’d be alright. I want this sense of security for YOU too.

Sure, conflicts still come up from time to time, but they are manageable, healthy conflicts. There are clear boundaries and expectations in place for everyone (including me!), so we all get to breathe a sigh of relief in knowing exactly what our roles are, and what’s expected of us.

I have the freedom to work from wherever I want, travel, and enjoy a lot of time with my family.

**I'm finally being the leader and the woman that I always wanted to be.**

So, what does all of this have to do with you?

Maybe you're just getting started in your business. Maybe you've been in business for a while, and you're struggling.

Or maybe you seem to be doing fantastic, but you feel a vague sense of unease (especially after reading my story!) – like there's something you don't know that could create real problems for you down the road.

Perhaps you are even hiding out parts of yourself because they feel too sensitive or maybe even unacceptable and you aren't sure how to live all of yourself and support your family.

Wherever you are, I've been there too.

**When you implement the LIFT systems in your business, you will have clarity and confidence knowing you are making wise choices for your life and business.**

From starting my law firm, struggling to get by, growing it to a seven-figure business, and then selling it. From building a second business, getting it to a million dollars in revenue, being sued, and losing everything to bankruptcy.

# Client Success Spotlights:

## *The Impact of Having LIFT in Your Business*

“If I would have had LIFT in my business right from the beginning, I would have made far more money and saved myself hundreds of thousands of dollars in mistakes. **If you are serious about building yourself a sustainable, profitable business, LIFT is a necessary ingredient.**”

-JJ Virgin  
4-Time NY Times Bestselling Author | [JJVirgin.com](http://JJVirgin.com)



“I’ve completed LIFT and wow, what a powerful course. I never expected meeting with an accountant could bring on such a feeling of joy and clarity but I knew, truly knew that I was leading my business, aware of my numbers and on a solid foundation. Agreements are in place, minutes done, bookkeeper set. I just wanted to say thank you. **I feel the solidness of the foundation – like my business is something I can lean into as a support structure for me.**

I’m an attorney who has drafted agreements and taught contract drafting at Stanford – and I definitely am using some of your templates and incorporated pieces directly into my client and my contractor templates. I can’t wait to recommend your work to my clients. And moving on to the Money Map as soon as I’m done.”

-Jeanine Becker  
Leadership, Collaboration & Negotiation Consultant | [JeanineBecker.com](http://JeanineBecker.com)

# Client Success Spotlights:

## *The Impact of Having LIFT in Your Business*



"I got Alexis' LIFT program because I knew there was a gap in my knowledge around the Legal, Insurance, Financial, and Tax side of my business. I was a bit skeptical at first because I'm from Canada and I wasn't sure how much of the information would apply to my Canadian business. Luckily I just dove in, and I'm so glad I did, because Alexis opened my eyes and helped me to really see the bigger picture.

Before LIFT I was taking unsolicited advice from people in my life who don't run businesses. Because of the advice in the program, I finally had enough information to hire the right people to help me grow my business and take care of the important LIFT pieces. More importantly, **I was able to save so much on my taxes these past two years because I knew what I was doing.** Thanks so much Alexis! I keep going back to the program every year as my business grows and I'm ready for the next step!"

-Nathalie Lussier  
Founder of AmbitionAlly® [NathalieLussier.com](http://NathalieLussier.com)

From rock bottom, to rebuilding on a foundation of true success, making the Inc. 5000 3x in a row, and now on the verge of my first successful exit with a company that will thrive well beyond me.

**From the heights of success to the lowest of lows (and everything in between), I have been where you are now.**

And now I want to help you LIFT your business – with a solid foundation below you – so you can enjoy the kind of freedom, lifestyle and impact you’ve always wanted.

## **Are You Doing Business in the Dark?**

Now that you see what happened in my life and first two businesses, can you identify any common patterns of your own?

Maybe you...

- know your financial systems are shaky, or you should be looking at some reports for your business, but you don’t know what you need and when,
- have a few undocumented agreements floating around out there that could come back to haunt you one day – or don’t have legal agreements in place at all,
- are in the midst of disputes and conflicts with people important to you in your business (or even in your life), and it’s keeping you from focusing,

- suspect you have some tax problems, but don't really have the time to deal with it,
- aren't sure if you have the right insurance. Or you don't have ANY insurance, and just haven't gotten around to looking into that,
- are keeping key parts of yourself hidden because you are scared to show them and be rejected – so you hide out in the dark.

Each of these examples is easy to justify to ourselves.

For example, maybe you don't think you need legal agreements because you only do business with people you trust. Or that you don't need clear boundaries and expectations with your team, because you believe everyone's got the same work ethic as you.

**These are self-sabotaging beliefs that are keeping you from having the life and business you really want.**

And, until you address these beliefs head-on, and do what's actually right to support the foundation of your business, they will keep showing up to keep you stuck.

For example, you'll get disappointed repeatedly every time you hire someone, or partner with someone. They won't show up, as you had hoped in the beginning because you didn't insist on a written agreement to set expectations and boundaries.

Or perhaps you'll keep running out of money, ending up with unexpected expenses constantly, losing what you make in various ways, or not having

enough to invest to grow your business when the perfect opportunities present themselves.

Maybe you'll find yourself in conflict after conflict, sure you are right, and surprised that "other people" are so inconsiderate.

These are ruts. And they are created by patterns of behavior and beliefs you've been engaging with your whole life, that you can't see – but most everyone else around you can.

All you know is that you keep running into the same types of issues, again and again.

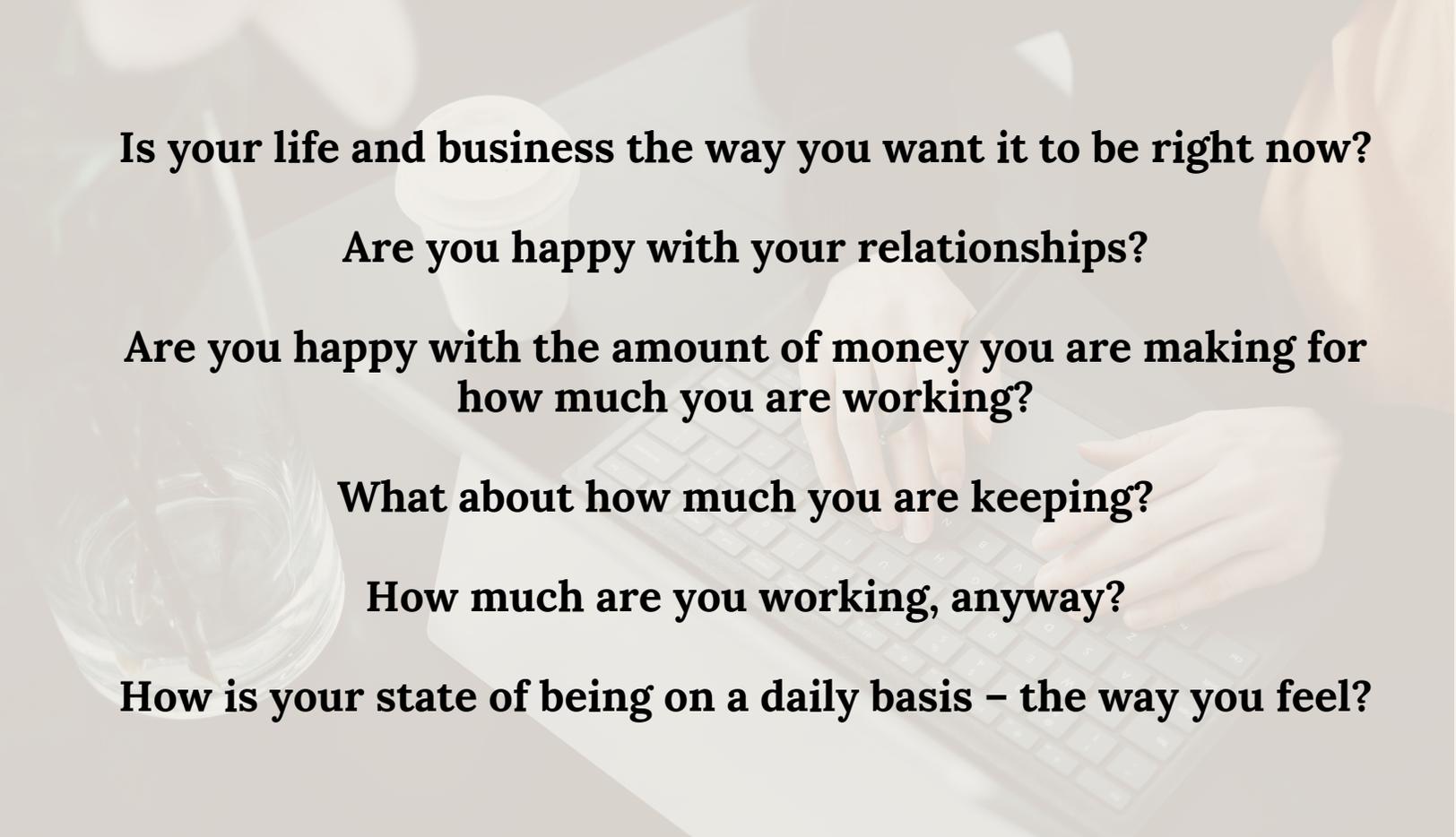
### **SO, WHAT CAN YOU DO ABOUT IT?**

Step #1

## **Live Your Life and Operate Your Business with Eyes Wide Open**

Remember this phrase "eyes wide open" because it's that imagery that will help you to take action even when it's difficult. You will no longer travel through life or business blind to what is right in front of you.

What's that? Do I hear you thinking "Ali, my eyes ARE wide open!" Well, if that's the case, let me ask you a few quick gut check questions...



**Is your life and business the way you want it to be right now?**

**Are you happy with your relationships?**

**Are you happy with the amount of money you are making for how much you are working?**

**What about how much you are keeping?**

**How much are you working, anyway?**

**How is your state of being on a daily basis – the way you feel?**

If you are happy with your life and business in all of these areas, you can stop reading now and go find something else to do with your extremely valuable time.

But if you aren't – if you know things can be better and you want them to be, if you want to be making more money or you're struggling with a difficult customer or team member or even your marriage or kids – then keep reading because...

**You've got your eyes closed to something that's right in front of you.**

Now, you might be saying, “Why would I WANT to see my shadow?!? Shouldn’t I keep it hidden? It’s dark, it’s scary.”

Or maybe you’re saying, “I don’t have a shadow. There’s nothing dark and scary in me.”

Here’s the thing...if you want to live eyes wide open (and you do or you wouldn’t still be reading this), you need to first accept you DO have a shadow, and then be prepared to see it and bring that shadow into the light.

It’s in service to the up-leveling of the consciousness of all of humanity, not just yourself.

The only way to overcome the self-sabotage that comes if you stay in the dark, is to shine the light on it...

**Remember this phrase “eyes wide open”.**

**You’ve got your eyes closed to something that’s right in front of you. Or maybe you’re saying, I don’t have a shadow. There’s nothing dark and scary in me.**

# Client Success Spotlights:

## *From Playing Business "Dress-Up" To Leading A Worthwhile Company*



Hi, this is Christiane Holbrook. You probably never heard of me. My team and I love working in the background. We quietly strategize, productize, and market for several huge-thinking, mission-driven remarkable entrepreneurs just like Alexis.

For the last 25 years I have watched my former husband as he built a multimillion dollar company from scratch. While I was passionately involved in the creative aspects of that growth, when it came to the "dry, hard" aspects of running a business (you know, things like numbers, contracts, legal protection, taxes etc.)

I shied away. I left it to him. I ignored it. I dismissed it.

Result: Five years ago we got divorced and thanks to a detrimental prenuptial agreement, I did not partake in any of the wealth. Still, I continued ignoring any significant legal or financial aspects of life...

Luckily I had just enough capital to get started on my own. With more than 25 years of business-building experience, I was looking forward to showing the world what I was capable of.

I created a beautiful website, I sounded confident, I hired staff, I did what I saw every successful coach and marketer do... and it wasn't enough.

Deep inside I knew that how others saw me, was not how I saw myself. Even though I was great at strategizing, productizing and marketing my own business, I just never took the time to do what still felt too hard to me. I never took time to create a concrete business structure under my company.

**Even though my business grew, I made money and my clients loved me, I often still felt like an impostor, incongruent with who I so aspired to be.**

Here I was, telling my clients that a magnetic brand was THE essential foundation for any business success, while I consistently ignored the “other” oh, so essential foundation, the one Alexis will patiently guide you through in this manifesto.

Well, I don't want to take away the suspense...

... but I can assure you that working closely with Alexis and her remarkable gifts while implementing all she will teach you right here, has resulted in a never-before-felt genuine confidence about my long-term success and myself as a trustworthy leader.

Now I know that in the past, I WAS in effect playing “dress-up” with my leadership in life and business.

I will always be grateful to Alexis for helping me to see what I couldn't and making the hard things so easy that I was finally able to face and master them and with that, stopped forever doing business in the dark.

**Thank you from the bottom of my heart, Alexis for helping me bring my life and business out of the shadow into the light."**

-Christiane Holbrook  
Former CEO of Inspired Business Resources, Inc.

## Step #2

# Break the Pattern That's Holding You Back (From What You Want Most)

Time and time again as I've worked with people, I've seen that the very thing they don't want to do, is exactly the thing that is blocking the realization of all their dreams.

I used to believe freedom meant not having to do anything I didn't want to do. I now see freedom is being willing to do whatever is necessary to have the business and life I want, even through the resistance.

**Here's the truth: The hard thing you are avoiding doing is the ONE thing you must do to get to the next level.**

There's something that needs to be done in your life or business right now – and you know what that something is – but you've been avoiding it because it likely seems really hard.

When you read that just now, there may have been a thought or image (or more than one) that came into your mind about something you have been avoiding.

If something came through, write whatever it was down. Draw it if you have to. Just capture the image. Here's the place to do that...

If you can't remember it clearly enough this time or it's too vague of an image, just become aware of it. Next time, make the decision (an internal decision) that you are going to be more aware. Next time it comes to you, be prepared to capture it, no matter how fleeting.

Whether the “hard thing” for you is:

- Hiring the right support,
- Having a difficult conversation with an existing team member,
- Getting your agreements documented,
- Getting your corporate entity set up correctly,
- Hiring a bookkeeper,
- Getting insurance,
- Paying back taxes,
- Filing late returns,
- Packaging your services with clear boundaries and expectations.

Now that you've become aware that avoidance is the beginning of the destructive pattern that is holding you back from experiencing success, prosperity, and freedom in your business, it's time to easily and gracefully break the pattern.

## How?

First, you have to be extremely honest with yourself. Remember, keep your eyes wide open. What are you avoiding? Awareness is the first step.

Next, it's time to put a solid LIFT Foundation in place for your life and income...

## Step #3

# Build a Strong Foundation to LIFT Your Business into Long-Term Success

Before we look at how you can use the LIFT Foundation to convert your business from a shadow business into an eyes wide open business, let me make sure you completely understand what a LIFT Foundation is.

Your LIFT Foundation is made up of the Legal, Insurance, Financial and Tax systems of your business.

(And if you started yawning just now, or found your eyes glaze over a little bit, as soon as I began to talk about Legal, Insurance, Financial and Tax, take note! Getting sleepy or feeling bored are powerful avoidance techniques. But this is not something you can avoid any longer...)

It's the strength of these 4 pillars that determines the ultimate success of your business, and your willingness and ability to see what's in those dark corners. Think of the roots of a tree. The tree can only grow as big as its roots will support. Or the foundation of a skyscraper, which determines how tall the skyscraper can go. Your LIFT Foundation is the same.

**First, you have to be extremely honest with yourself. Remember, keep your eyes wide open. What are you avoiding? Awareness is the first step of all.**

## Your business can either be limited or supported by your LIFT Foundation.

Lack of a LIFT Foundation means your life and business is built on a house of cards – one challenge away from disaster. Without a LIFT Foundation in place, when things go haywire in your life and business (as they will), it could take months or even years to bounce back. Or you could be down for the count permanently.

With a LIFT Foundation in place, you'll be able to easily move through each and every challenge with grace.

Let's look at each of the LIFT elements in turn, so you can see some of the ways NOT having a LIFT Foundation, results in subconscious self-sabotage of your business again and again.

### **ON THE LEGAL SIDE, NOT HAVING LIFT COULD MEAN:**

- **Knowing your personal assets are at risk** from your business activities, which means you will hold back from taking risk, making necessary business investments and putting yourself out there at a big enough level.
- **Not having the team support you need** or finding the team you do have, is not meeting your needs on a consistent basis. Usually this is because you have not set up the framework of your employment practices in the right way.
- **Finding your partnerships (with affiliates, joint venture partners, vendors, clients, and even business partners) are not satisfying.** This is generally a result of not having a process in place for creating and documenting agreements that inspire and properly incentivize right action.

## **ON THE INSURANCE SIDE, NOT HAVING LIFT COULD MEAN:**

- Your subconscious mind will always be trying to protect you from **taking risk**, which means self-sabotaging behaviors will come into play right before you are about to take a risk that would grow your business or expand your life.
- If you are in a partnership, not having insurance in place can lead to **subconscious feelings of insecurity in the strength of the partnership**.
- You will simply **not play full out**.

## **ON THE FINANCIAL SIDE, NOT HAVING LIFT COULD MEAN:**

- Making **non-strategic buying decisions** that often leave you empty and kicking yourself afterwards.
- Feeling unsteady financially, which means **not making the investments your business needs in order to grow**.
- **Consistently undervaluing your services** and not commanding the fees you deserve.
- Frequently **feeling disorganized and out of balance**.
- **Using debt unwisely** rather than as a resource for investing in the right things your business needs to grow and serve.

## **ON THE TAX SIDE, NOT HAVING LIFT COULD MEAN:**

- Spending more money than you need to be on taxes.
- Working really hard and feeling as if you are spinning your wheels, not keeping enough money or making a big enough impact.

If you recognize any of these expressions in your business, you've probably associated them with things on the surface, like making poor hiring decisions, or not having enough money, or not having enough time. But, they aren't.

These are the hidden shadows, oftentimes reflective of your own deeply held unconscious beliefs about yourself, that keep your eyes closed to what's really happening and sabotage you again and again.

**These are the hidden shadows that keep your eyes closed to what's really happening**

If you want to make a real difference, build a real-deal serious business, and make serious and consistent income you can count on, you have to have LIFT in your life and business.

Here's what's really exciting:

**When you begin to work on your LIFT Foundation, it feels really good. Like the deep down kind of good that is unshakeable.**

(Especially when you know what you are supposed to be doing, and have a clearly laid out step-by-step path to follow).

The hardest part is simply getting started.

Imagine what it would feel like...

... to have a potential client considering your services, and you immediately email her with a streamlined list of all your packages and prices – along with a pre-created client agreement – so she can easily say ‘yes’ to working with you.

... to know without a doubt whether to invest in a product, course, program or coach – because you are clear about the vision for your business (and not merely reacting to a well-written sales letter!).

... to make your next hiring decision before you are desperate for the help – so you can take your time to find the right person (who can really support you in the way you know you deserve to be supported).

... to feel 100% confident that you are truly the leader you know you can be.

These are just a few of the ways your LIFT Foundation will support the growth of your business and ease in your life.

When you fill the holes in your LIFT Foundation, you will find yourself:

**Leveraging your time,  
Inspiring others,  
Free of financial insecurity, and finally  
Living your TRUTH**



**BEST OF ALL, WHEN YOU HAVE A SOLID LIFT FOUNDATION IN YOUR BUSINESS, YOU'LL NO LONGER FEEL LIKE AN IMPOSTOR OR A FRAUD.**

You know that feeling? Like one day you'll be found out? It goes away when you start to really take your business seriously.

I had that impostor feeling throughout my career (until I rebuilt everything after my bankruptcy), and I've always been surprised by how many other people (especially high achievers) feel the same way. It's a common feeling among those of us who hold ourselves to the highest of standards.

One antidote to impostor syndrome is to make the choice to do the right things in your life and business by building a secure LIFT Foundation beneath it all.

The external security isn't just to protect your business, but to strengthen your internal security systems – which affect everything else.

With LIFT in your business, you know without a shadow of a doubt that you ARE worth it. You've proved it to yourself by building a real deal, serious eyes wide open life and income.

Now you might be saying, "Alexis, I get it. I can see where my eyes have been closed, and I'm ready to open them. I'm ready to put a LIFT foundation in place. But how do I actually do that?"

Great question!

It all starts with answering an important question about you...

# Your Next Steps: Do You DIY or Delegate?

No matter where you are in your life – just starting out, recently hit 6 figures, approaching 7 figures or have been in the world of work and business for years – you can build a wildly successful eyes wide open income.

But there's more than one way to go about it. So let me ask you a question...

**Are you more of a DIY-er? Or do you prefer to delegate?**

This could be a choice of saving money vs. saving time. It could also come down to your personality, and how involved you like to be in every aspect of your life and business.

If you prefer to DIY, then your next step is to check out the LIFT Foundation System.

LIFT is a self-study and self implementation program to guide you to learn exactly what you need to know (in just about 5 hours of self study and with detailed implementation maps) to get your life and income supported with a LIFT Foundation you can count on.

In it, you'll benefit from the learning of my million dollars worth of mistakes and hundreds of hours of interviews and study to correct them, all synthesized into one trusted system – designed to guide you to discover what you can do yourself when it comes to putting your Legal, Insurance, Financial and Tax foundations in place, and where you will choose to have support.

You'll receive all the education, plus legal agreements, templates, implementation maps, and much more – plus a free LIFT Assessment of your business with a Family Business Lawyer® (\$500 value) trained by me, to shine the light into the dark corners of your life and business and help you see what's hard to see.

Going the DIY route is like flipping on a light-switch. You'll get educated about what you don't know, what you can do yourself, and be able to make more informed choices about when to hire a trusted advisor to help.

**>> Learn More and Get Started With the LIFT Foundation System <<**

Delegating, on the other hand, means having a guide that can walk with you into the darkness, hold your hand when you need it, shine the light when you can't see, and support you to make the wise business decisions your leadership requires.

And I believe that lawyers, who are trained in a new law business model, are the best ones to do this.

Why lawyers?

**Lawyers are fiduciaries (meaning their license requires them to act in your best interest). They are trained to spot the issues.**

However, most traditional lawyers are NOT trained to proactively point them out – but instead to wait until they are contacted when there is a problem. And their business models and financial incentives have not had their interests aligned with yours (until now).

With the old law business model way of doing things, lawyers are not financially incentivized to truly get to know you and your business, and proactively keep you out of trouble so you can continue growing your business.

I've created new business models for lawyers that shift all of this, so you can work with a lawyer who will help you see where you may be sabotaging, selling yourself short, and otherwise compromising your own ideal version of success.

With this support, you can finally create the kind of income and impact you know you are capable of.

**I trained these lawyers to be the kind of advisor I wish I had along the way, so that you do not have to go through the darkness on your own – the way I did.**

With a Family Business Lawyer by your side, you will be guided into clarity around the life and income you want, and given support to take the next steps to get you there – with the right business model, and the Legal, Insurance, Financial and Tax (LIFT) systems to support it.

And, you'll never get unexpected invoices in the mail, wonder if you should call your lawyer or not, or have to go it alone again.

If you would love to have a Family Business Lawyer guide you into the light and support you in building your life and business with your eyes wide open, click the button below to search for a lawyer by industry or location – and request a LIFT Assessment to get started.

**>> Find a Family Business Lawyer + Request a LIFT Assessment Here <<**

I look forward to seeing you at the next level of your awake, aware, on your own terms life and income.



Remember, your next steps are:

**Go the DIY Route:**

**Learn More and Sign Up For the LIFT Foundation System at  
[eyeswideopenlife.com/LIFT](https://eyeswideopenlife.com/LIFT)**

**OR**

**Delegate:**

**Find a Family Business Lawyer + Request a LIFT Assessment at  
[www.FamilyBusinessLawyer.co](https://www.FamilyBusinessLawyer.co)**