

OVERVIEW:

We are a diverse group of CEOs who use a structured process to challenge, coach, and support one another on personal, family, and business issues we face so that we can pursue and ultimately live the life we want to live.

GROUP NAME:

Level 5 - Level 5 leaders display a powerful mixture of personal humility and indomitable will.

WHO:

Here's who's currently in the group:

- NAME NAME
 - President of HBC
 - Industry: Healthcare Services
 - www.linkedin.com/NAME
 - Married - one daughter - lives in Manhattan
- NAME NAME
 - CEO, Co-Founder TinyB
 - Industry: Tech - Consumer app for Millennial families
 - <https://www.linkedin.com/in/NAME>
 - Married - four boys - lives in Westchester (Originally from Sydney, Aus)
- Tom Krieglstein
 - Founder and Lead Trainer of [Swift Kick](#)
 - Industry: Trainers on Employee Engagement and Company Culture
 - <https://www.linkedin.com/in/tomkrieglstein>
 - Married - step-daughter - lives in Montclair, NJ

IDEAL MEMBER:

The ideal member for our group is someone who

- Is doing cool sh*t in the world as an entrepreneur.
- Runs, or ran, a company with revenue of at least \$1 million
- Takes an active role in their personal development.
- Loves to set and work on goals within a group setting.
- Lives with a growth mindset (vs fixed mindset).
- Has a desire to be successful in all areas of their life (Business, Family, Personal) however also is conscious and aware of the trade offs in life.
- Is willing to share at the deepest levels of business, personal and family to allow themselves to reach new levels of success.
- Makes changes within their company at the highest levels.
- Controls their own schedule (e.g. they can walk out of a meeting if they need to)
- Has a schedule that allows for monthly meetings as well as yearly retreats (see below).
- Doesn't do business with, or have a business/personal conflict, with someone else in the group.

- Fast and responsive communicator via email or other formats.
- Is not self-centered and keeps the spotlight on them and doesn't trump others to dominate a situation or conversation.
- Comes from a diverse background and experience unlike those already in the group.
- Has experienced growing and scaling a business to something larger than themselves.
- Has an adventurous spirit and open to challenging themselves and others outside the comfort zone and into the learning zone.
- No assholes :-).
- No stagnation
- Is authentic in how they show up in different situations.
- Is willing to work hard for the team and will raise the tide for everyone and not just themselves.

STRUCTURE:

1. Discussion focuses on personal, family & professional topics. We believe all 3 are so intertwined that it is impossible to discuss any topic without understanding and appreciating the others.
2. Discussion focuses on the 5% of information/feelings that are the deepest and most meaningful to us.
3. There are no barriers, so everything is on the table.
4. Everything is held in the strictest of confidentiality between the members.
5. The ideal group size is 6 - 8 people.
6. The group should have a nice diversity in backgrounds, thinking and professional paths.
7. Goal setting, tracking, & achieving play a big part, which means we'll be holding each other accountable to keep growing to new levels of success in all areas of life.
8. We meet 10 times per year (once per month) for 4 hours for our regular mastermind meetings.
9. Meetings typically are 3-7pm with a mandatory dinner afterwards.
10. In addition to the meetings we have one full day retreats around the tri-state area and one 3-4 day retreat somewhere in the world.
11. The yearly financial projections (around \$4,000) per person for the group are as follows (note that this is just the cost for things we would do, we don't have a membership fee since we aren't part of any larger organization):
 - \$80/per month for dinner (\$1,000/yr)
 - \$400-\$500/mini-retreat
 - \$1,500-\$2,000/full retreat