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## BUILDING A BETTER LIFE AND PRACTICE



**dynamicDIRECTIONS®**  
Building a Better Life and Practice for Financial Advisors



A background image of a business meeting. Several people in business attire are seated around a table. One person's hand is visible, pointing at a document with a bar chart. On the table, there is a white coffee cup, a glass of water, and a laptop. A large, semi-transparent green circle is centered over the image, containing white text.

**DOUBLE YOUR  
GDC IN THREE  
YEARS OR LESS  
WITH HALF THE  
CLIENTS**

# + DYNAMIC DIRECTIONS

What keeps you awake at night? You are a successful financial advisor and business owner, but you know you are capable of more. You lie awake in your bed, thinking about how you can't quite figure out what's limiting you right now. You need to know: how can you motivate your team and communicate your vision? How can you plan the next 10 years? Are your team members in the right roles? How can you get more referrals? What's the best way to build a marketing plan? How can you keep increasing your GDC? Who can you talk to who truly understands the pressures of your position? If this at all describes the turmoil you feel in your head, Dynamic Directions is here to help. Geared toward high-achieving financial advisors who are committed to growth, D2 helps you discover the principles of growth, leadership and entrepreneurship.

## What is D2?

Dynamic Directions is a coaching and consulting firm specializing in building a better life and practice for financial advisors. Our goal is to help advisors double their GDC in three years or less with half the clients.

We accomplish this through comprehensive coaching and consulting focused on our top value of results. Our due-diligence process starts with an in-depth assessment of your practice, followed by a specific plan of attack to not just reach, but exceed your goals.

We can also focus on individual areas of your practice, including: Practice Management, Marketing and Referrals, Recruiting, Operations, Client Services, Financial Planning, Human Resources, Entrepreneurship, Insurance and Executive Coaching.

## Why are we different?

We believe that life-changing results don't happen by accident. Our coaching helps you discover proven principles to follow as you make changes to bring success. Our Dynamic Directions coaching team consists of current and former CAC advisors, top-rated Barron's advisors, PWA advisors, Certified Master Coaches, published authors and industry experts. We believe no other Franchise Consultant team can match our breadth, depth, strength and capacity to take on new advisors.

**"I've become a better leader and that's transcended just my office. It was always there but (Dynamic Directions) awakened it and put an exclamation point on it."**

**- Tony Baldi, CFP®, CAC, New York**



This exclusive program for high-achieving entrepreneurs takes D2's coaching to a more intensive level focused specifically on mastering the fundamentals and mindset necessary for high achievement as an entrepreneur. Based on principles taught by Dr. Nido Qubein, the program includes live workshops, coaching from experienced mentors and interaction with like-minded entrepreneurs. Application is by invitation only – if you are interested, we will discuss the program during your due diligence process.





# <sup>+</sup> HOW WE DO IT

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## Coaching

You will receive regular coaching with one or more of our expert Certified Master Coaches who will develop a detailed plan to follow based on your practice assessments and analysis. Whether your coaching is comprehensive or focused on one specific area, we are committed to achieving top-level results.

## Live Workshops

Every year, you will attend two D2 workshops with interactive presentations, discussions and inspiration from fellow advisors who will help you with your challenges. You will come home with action items to jump start your momentum, plus we have a lot of fun!

## Mastermind Groups

D2 holds mastermind groups with your peers to provide immediate feedback to challenges you face as a business owner. You will each share a specific challenge, listen to possible solutions from the group and commit to specific actions before the next meeting. This is a powerful process that will build true community as well.

## Community

When you join D2, you are getting more than coaching. You are becoming part of a community of like-minded advisors who inspire each other to greatness. You become like those you spend time with, and there are no better people to be around than D2 members. Make it a priority to attend our live events, where you will find great value in sessions and just as much value in the conversations you have around the dinner table.

## Investment Webinars

Get the latest investment information, including market updates from Ameriprise CAC Advisor Drew Watson, as well as deep dives into topics such as Affluent Investors, Marketing Approaches, Alternative Investments, Market Volatility, Case Studies and much more.

## Consulting

Once you identify where you are and where you want to go, D2 will show you the best path to your desired results. D2's "Tool Box" covers the areas of financial planning, marketing, insurance, investments (including discretionary), practice management, human resources, hiring, client experience, team building and much more.

# + SUCCESS STORIES

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## Bob Bonfiglio

Since he began his relationship with Dynamic Directions, Bob has integrated three new practice purchases into his and more than doubled the staff in his office — while reducing the number of hours he works. He's established many COI relationships that provide referrals regularly and doubled organic client acquisition. These strategic moves have landed him on the Barron's top 1,200 list and he's ranked as the number one advisor in New Hampshire.



### +141% growth

Thanks to Dynamic Directions, Bob's service fees increased when he developed consistent pricing and began charging what his services were actually worth.

## Greg Mullaney

Greg was in a business partnership with a family member who had a different vision for their company. After he became an owner, he had no staff to lessen his responsibilities and no marketing plan. With the help of Dynamic Directions, Greg found the right staff for his needs and began using professional alliances to market his practice. He also developed a top 100 list to target the right kind of prospects and advocates he needed.



### +300% income

When Greg could focus on his own business, hire the right staff and develop a thorough marketing plan, the results showed in the amount of revenue he brought into the company.

## Audree Begay

When Audree needed to separate from a business partnership to build her own practice, Dynamic Directions successfully coached her through the difficult process. Audree now leads her own thriving, ten-member team. Over the last two years, she has increased her GDC by more than \$1.1M and her assets under management by \$103M. She has also successfully launched Ameriprise's SPS Advisor program, managing more than \$100M in assets.



### TOP 100

Audree holds the prestigious honor of being named to the list of Barron's Top 100 Woman Financial Advisors from 2012 -2015.

# + MEET OUR TEAM

These are the coaches who will lead your journey of transformation.

## Travis Chaney

Travis is the CEO of Dynamic Directions. A Certified Master Coach™, he has coached clients to places on the Barron's Top 1,200 Financial Advisors list and the Barron's Top 100 Female Advisors lists. He was the Ameriprise Franchise Consultant of the Year in 2011 and 2014.



## Jon Randall

Jon is a Certified Master Coach™, a national presenter at financial service industry conferences and a published author. He works with some of the top financial professionals in the industry, and his highly effective coaching helps them grow at a significantly higher rate than average.



## Kary Mangat

Certified Master Coach™ Kary Mangat focuses on working with practices below \$500,000 in Total GDC and developing Associate Financial Advisors. With more than 30 years experience in the financial industry, he will inspire your growth and development.



**Additional D2 coaches focus on specialized areas including:**

- **Practice Management**
  - **Investments**
  - **Recruiting**
  - **Marketing**
  - **Insurance**
- **Financial Planning**
- **Operations**
- **Human Resources**
- **Executive Coaching**
  - **Client Services**
- **Entrepreneurship and more.**

**Whatever your need, we have a coach who can meet it.**

# + CONTACT US

Dynamic Directions is not for everyone – it only works for financial advisors who are committed to being the best of the best.

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If you are not ready for the level of commitment it takes to get to the top, you're doing the right thing by not getting in over your head. If however, you are eager for true success and significance, get in touch today to schedule a complimentary phone consultation that will begin our due diligence process.

Our top priority is always to deliver results for our clients. If you think you have what it takes to join our elite list of top producers, call today!



## DYNAMIC DIRECTIONS

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