



dynamicDIRECTIONS[®]
Building a Better Life and Practice for Financial Advisors

AND TRAVIS CHANEY PRESENT

Ameriprise Franchise Owner Case Study

EXPERIENCING TURBO GROWTH

MICHAEL
HANCOCK
Charlottesville, Virginia

INTRODUCTION

JD, CFP[®], Private Wealth Advisor
CERTIFIED FINANCIAL PLANNER[™] Practitioner
Practice Transformation Began: November 2010

*Data was used from advisor's Broker Dealer reports during the time periods noted.



RESULTS

TOTAL GDC

+151%

November 2010: \$746,716
August 2015: \$1,876,672

ASSETS UNDER MANAGEMENT

+87%

June 2011: \$94,454,697
August 2015: \$176,223,000

ADVICE SERVICE FEES

+81%

June 2011: \$153,502
August 2015: \$277,628

CLIENTS ACQUIRED

+130%

June 2011: 17
August 2015: 56

WITHOUT DYNAMIC DIRECTIONS

Before working with Dynamic Directions, Michael struggled with seeing the big picture. He didn't understand how he could grow his practice and still maintain a balance in his life. He wanted to take his practice to another level, but didn't know what steps to take to accomplish that while maintaining a good quality of life.

His relationship with his business partner was also not what he hoped it would be, and Travis was able to guide him through clearly articulated steps to resolve the situation.

"The business can consume your life if you let it," Michael said.

WITH DYNAMIC DIRECTIONS

Michael has made leaps in his GDC growth as well as his financial planning fees since working with Dynamic Directions.

He's implemented life insurance strategies and earned significant GDC that he would not have done without the encouragement and push from Travis.

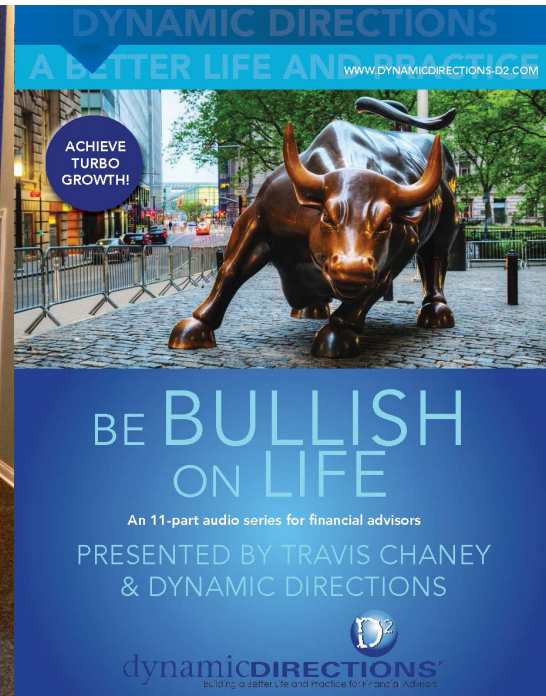
Most important, Michael said, is the help Travis has provided with a variety of CEO, leadership and management issues.

"That is an intangible accomplishment that I can't place a value on. Travis has been a friend, advisor, coach, trusted confidante — whatever it has been that I have needed — he has been there for me."

WHAT'S NEXT FOR THIS ADVISOR?

Michael plans on doubling his GDC in the next three years, or even sooner, which will require hiring another AFA and more staff. He hopes to establish a new succession plan that will allow two AFA's to begin buying into the practice, and he is also planning to create a second practice in California.

Michael also hopes to transform himself into a CEO to focus on strategy and less on advising clients. His future is bright, and with the guidance of Dynamic Directions, he is confident he will achieve his goals.



TRAVIS CHANEY

Travis Ray Chaney is a Certified Master Coach®, CFP® and CEO of Dynamic Directions – a coaching firm that helps financial advisors double their GDC in three years or less with half the clients.

Travis is also the author of several audio series and the book "Turbo Growth; Proven Strategies to Create an Extraordinary Life and Financial Planning Practice."

DYNAMIC DIRECTIONS

Dynamic Directions works in a coaching/consulting capacity with more than 130 advisors from 33 different states and has 8 coaches/consultants on the team. Specifically, Travis works with larger group and individual practices who typically meet the requirements for PFS, PWA, CAC and Barron's Top 1,200 status.

MORE

For more information on how you or a Financial Advisor you know could benefit from a coaching and consulting relationship with Dynamic Directions, please contact Travis Chaney by email at tchaney@dynamicdirections-d2.com or visit the Dynamic Directions web site at dynamicdirections-d2.com.