



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

Ameriprise Franchise Owner Case Study EXPERIENCING GROWTH

DAN
GAMM
CRPC[®]

INTRODUCTION

Private Wealth Advisor
President, TW Financial Group
Warwick, RI
Practice Transformation Began: September 2011

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



RESULTS

TOTAL GDC
448%

Sept. 2011: \$511,000
April 2022: \$2,799,356

MANAGED GDC
+572%

Sept. 2011: \$199,872
April 2022: \$1,342,486

INSURANCE
+251%

Sept. 2011: \$12,972
April 2022: \$45,525

AUM
+513%

Sept. 2011: \$51,866,622
April 2022: \$317,938,000

WITHOUT DYNAMIC DIRECTIONS

Dan's practice was struggling to maintain a growth trajectory before he hired Dynamic Directions. He did not have systems in place to acquire practices, integrate new team members and make processes more efficient.

Dan also did not value his own services highly enough, leading to low fees. He was not allocating time to work on his business, which meant he was neglecting important CEO functions needed to keep the practice running smoothly.

WITH DYNAMIC DIRECTIONS

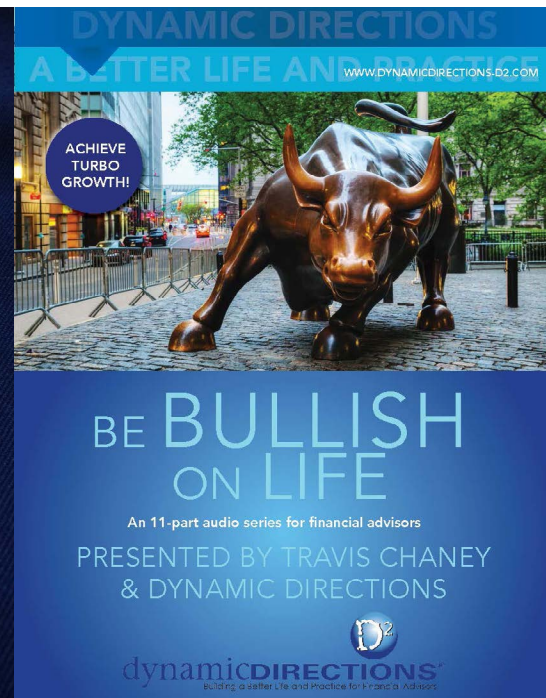
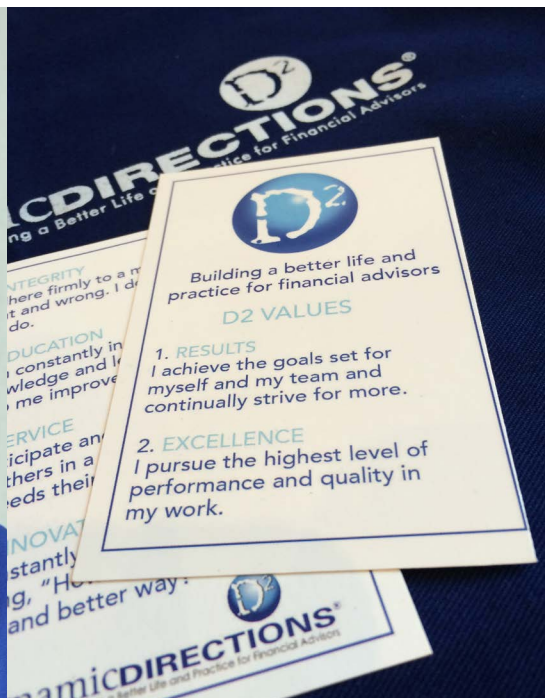
Since he hired D2, Dan has experienced tremendous success. His numbers show amazing growth, which has been made possible by integrating new team members, building efficient systems, acquiring practices, and dedicating specific time to work on plans and strategies for his business.

Those plans are based on principles Dan has learned as he joined Inner Circle Entrepreneur (ICE) through D2 to improve his entrepreneurial and CEO skills. He now focuses on that role for several hours every month, even moving off-site for added focus.

Thanks to Dan's success, he has also been able to purchase his dream vacation home!

DAN GAMM TESTIMONIAL:

"Dynamic Directions has helped me grow my business and understand it better. They have helped me stay on the cutting edge so I continue to do things very few advisors are doing. It has evolved from a mentor/mentee relationship to friendships. I value it very much both on the professional side and the personal side. D2 has answers to almost everything, and they're always available for you."



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 two books, *Turbo Growth: Proven Strategies to Create an Extraordinary Life and Financial Planning Practice* and *The 3 CEOs*.

DYNAMIC DIRECTIONS

Dynamic Directions builds an extraordinary life and practice for financial advisors.

- We work with more than 350 advisors and practices
- Our clients manage more than \$162M in GDC annually
- Their Book of Business is more than \$21B
- We feature more than 15 coaches and consultants

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.