



**dynamicDIRECTIONS**<sup>®</sup>  
Building a Better Life and Practice for Financial Advisors

# Ameriprise Franchise Owner Case Study EXPERIENCING GROWTH

**ED  
POACH**

CFP<sup>®</sup>, APMA<sup>®</sup>, CKA<sup>®</sup>

## FORTIFY PRIVATE WEALTH MANAGEMENT

Private Wealth Advisor  
Chief Executive Officer  
Canonsburg, PA

Practice Transformation Began: April 2015

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

## RESULTS

**TOTAL GDC**  
**260%**

April 2015: \$774,948  
June 2022: \$2,790,152

**AUM**  
**+99%**

April 2015: \$76,467,500  
June 2022: \$151,848,000

**MANAGED ACCOUNT GDC**  
**+333%**

April 2015: \$468,881  
June 2022: \$2,030,246

**ADVICE FEES**  
**+207%**

April 2015: \$82,183  
June 2022: \$252,707

## WITHOUT DYNAMIC DIRECTIONS

Before hiring D2, Ed ran his small practice with the mindset of an individual advisor even though his team included one other advisor and two support staff.

His practice wasn't organized or systematized, his financial planning fees were too low, and he had low engagement among prospects and clients. Some of the team members he did have were the wrong fit for his practice.

All of these obstacles kept him from doing the one thing he really wanted to do: grow!

## WITH DYNAMIC DIRECTIONS

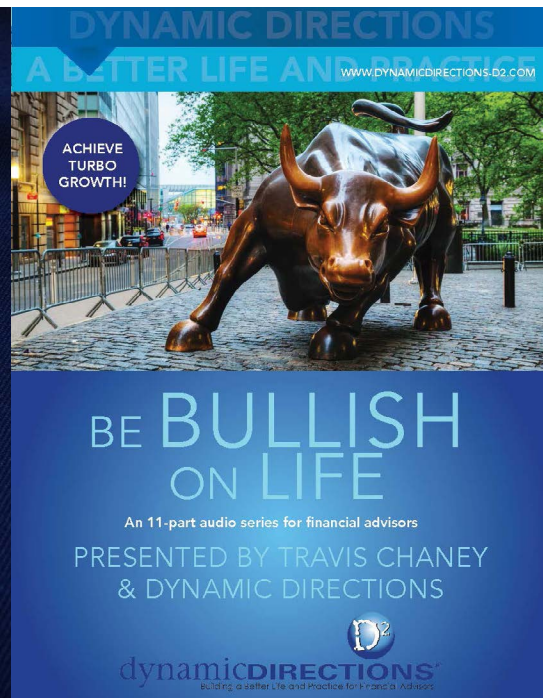
Fast forward after a few years of coaching from D2 and Ed has become a focused entrepreneur and transformational leader with an executive team. He has brought a partner into the practice and his team has increased to seven advisors and seven support staff, each with well-defined role.

Ed's total GDC has more than tripled as he has grown organically and through mergers and acquisitions. As he applied intentional congruence to his life and practice, he also bought more commercial real estate to house his firm.

He has also implemented a successful client service model to provide an amazing client experience, and he has no plans to slow down anytime soon!

# TRAVIS CHANEY TESTIMONIAL:

“The number one thing D2 has helped me with is accountability. They make me think about the solutions that are necessary for myself personally, and for my entire practice and for my team. The results have been wonderful and the investment in D2 is one hundred percent worth it. If you look backwards at the growth they’ve helped me attain through the systems and process they’ve helped me build and how they have helped me focus and be a better leader of an organization that has grown three-fold, then I don’t even consider the investment part of the equation.”



## 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 450 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 [travischaney@dynamicdirections-d2.com](mailto:travischaney@dynamicdirections-d2.com) or visit the Dynamic Directions web site at [dynamicdirections-d2.com](http://dynamicdirections-d2.com).