



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

Ameriprise Franchise Owner Case Study EXPERIENCING GROWTH

JAY
WOERDEMAN
CFP®, CLTC®

THE WOERDEMAN FINANCIAL GROUP

Private Wealth Advisor
Chief Executive Officer
Kingston, MA

Practice Transformation Began: November 2015

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



RESULTS

TOTAL GDC
211%

Nov. 2015: \$1,036,938
June 2022: \$ 3,227,407

AUM
+307%

Nov. 2015: \$88,653,600
June 2022: \$360,568,000

MANAGED GDC
+400%

Nov. 2015: \$402,587
June 2022: \$2,011,726

ADVICE FEES
+87%

Nov. 2015: \$184,369
June 2022: \$344,624

WITHOUT DYNAMIC DIRECTIONS

Before hiring D2, Jay had a small team (himself and three team members), but he thought and acted like a solo practitioner. He was focused on a lot of things, but not necessarily the right things - he needed help becoming a better leader and systematizing his practice so he and his team would be much more organized.

All of these issues were part of his real struggle: how to hit turbo growth.

WITH DYNAMIC DIRECTIONS

Dynamic Directions helped Jay solve for all of these problems. Led by D2, Jay put systems into place to better serve a growing practice. This paid off when he began experiencing improved organic growth (his financial planning fees increased significantly) and completed several practice acquisitions.

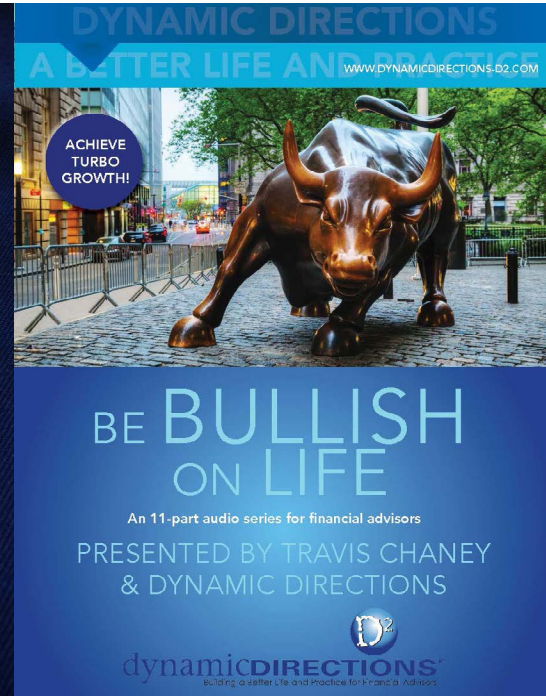
His team has grown to 11 people (four financial advisors and seven team members) as he has enhanced his mindset and grown his leadership, entrepreneurial and communication skills. As the practice has grown, they have maintained an emphasis on culture to make sure new hires are a great fit for the team.

Jay now functions as a true CEO and has put together an executive team to help him lead as he continues his current growth trajectory.

JAY WOERDEMAN TESTIMONIAL:

“Working with Dynamic Directions has made a huge difference in our growth. We have become more focused on processes and how people fit into specific roles. It would be very difficult to achieve the results we have without their guidance.

Most important is, they grow with us! That has been a key to our successful relationship.”



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 or visit the Dynamic Directions web site at dynamicdirections-d2.com.