



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

Ameriprise Franchise Owner Case Study EXPERIENCING GROWTH

**JIMMY
SCOTCHIE**
CFP[®]

ORACLE WEALTH MANAGEMENT

Private Wealth Advisor
Chattanooga, TN
Practice Transformation Began: March 2009

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



RESULTS

TOTAL GDC
420%

March 2009: \$540,647
June 2022: \$2,813,634

AUM
+488%

March 2009: \$71,256,603
June 2022: \$418,796,000

FINANCIAL PLANS
+205%

March 2009: 41
June 2022: 125

ADVICE FEES
+450%

March 2009: \$33,550
June 2022: \$184,457

WITHOUT DYNAMIC DIRECTIONS

Before hiring D2, Jimmy Scotchie was in a practice with his dad as a partner. They had one support staff person and needed help building systems that would enable them to increase the engagement of their current clients, acquire more new clients, and offer an outstanding client experience.

The goal was to grow, and Jimmy needed D2's help.

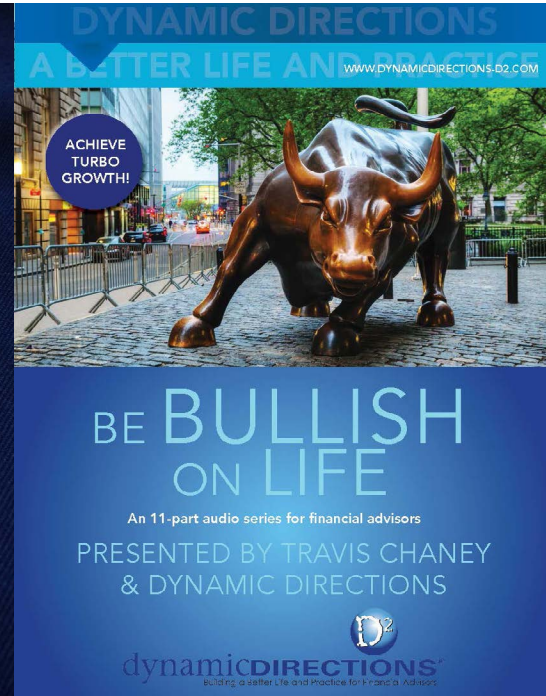
WITH DYNAMIC DIRECTIONS

With D2's guidance, Jimmy eventually phased his dad out of the practice and brought in his brother as an advisor. His full team includes three total advisors, five team members, and two consultants. As the team has grown, Jimmy has become a better leader and has focused on building a culture with the right team members.

His total GDC has increased more than 400% and his assets under management are up nearly 500% as his practice continually grows from both organic growth and multiple practice acquisitions. An improved client experience helps all the new clients stay engaged, and Jimmy is focused on continuing to grow the practice.

JIMMY SCOTCHIE TESTIMONIAL:

“The assistance of Dynamic Directions with the planning and preparation to acquire two good-sized practices has been invaluable. The next goal is to ‘run a business’ instead of the business running me.”



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.