



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

Ameriprise Franchise Owner Case Study EXPERIENCING GROWTH

**LEAH
BURNETT**
CRPC®, APMA®

AURORA WEALTH ADVISORS

Private Wealth Advisor
San Diego, CA
Practice Transformation Began: February 2017

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



RESULTS

TOTAL GDC
283%

Feb. 2017: \$650,681
June 2022: \$2,489,647

AUM
+234%

Feb. 2017: \$70,693,400
June 2022: \$236,141,000

MANAGED ACCOUNT GDC
+617%

Feb. 2017: \$223,690
June 2022: \$1,603,948

ADVICE FEES
+195%

Feb. 2017: \$140,297
June 2022: \$414,224

WITHOUT DYNAMIC DIRECTIONS

Leah was a practicing advisor with a total team of three people. She wanted to grow (and grow big), but she needed guidance on how to make it happen.

She wanted to add more team members, build systems, manage investments and learning how to acquire practices - all so she could better serve a growing number of clients.

WITH DYNAMIC DIRECTIONS

D2 CEO Travis Chaney started with Leah's mindset by challenging her to think differently in order to grow (rather than just looking at numbers). With the new mindset, she has brought on a partner, an executive team and more support staff (including an investment specialist), growing to a total team of nine.

Along the way, she has purchased three practices, completed one merger, and done three partial sales to reduce clients who did not align with her mission.

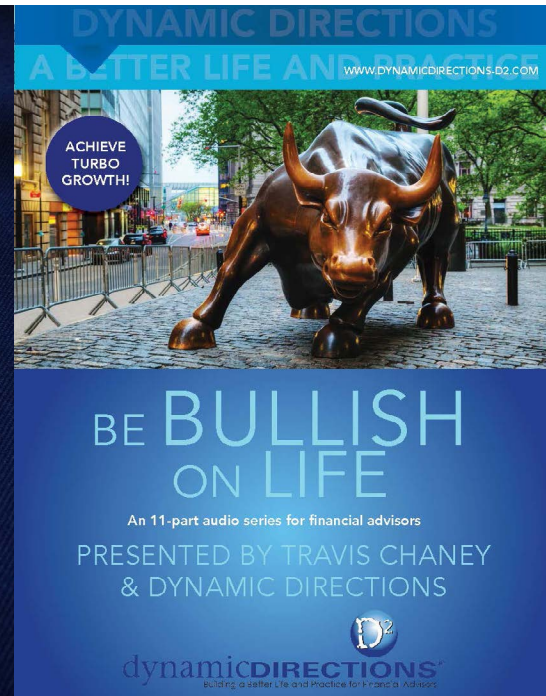
By thinking differently, the numbers took care of themselves - Leah has more than tripled her GDC and AUM and more than doubled her advice fees.

Leah plans to continue on her current growth path with the help of D2!

LEAH BURNETT TESTIMONIAL:

"Not only has Travis become a source that I rely on to make difficult decisions, celebrate successes and keep me focused on where my time is best utilized, his team of competent and caring coaches have guided both my operations leader and my AFAs to a more successful path.

I could not have done this without D2."



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.