



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

Ameriprise Franchise Owner Case Study EXPERIENCING GROWTH

**RANDY
PERKINS**
CFP[®], CRPC[®]

PERKINS-LONDON WEALTH ADVISORS

Private Wealth Advisor
East Meadow, NY
Practice Transformation Began: January 2010

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



RESULTS

TOTAL GDC
310%

January 2010: \$1,005,626
June 2022: \$2,752,370

AUM
+70%

January 2010: \$99,822,896
June 2022: \$151,848,000

MANAGED ACCOUNT GDC
+791%

January 2010: \$562,062
June 2022: \$2,030,246

WITHOUT DYNAMIC DIRECTIONS

Randy had a team of five total people when he first hired D2 in 2010, but he did not function as a true leader and CEO. He needed help developing his leadership and entrepreneurship skills and building the operations system and client experience to enable his practice to grow at an increased level.

He also did not price his services appropriately and needed help interpreting the value he and his team offered to clients.

WITH DYNAMIC DIRECTIONS

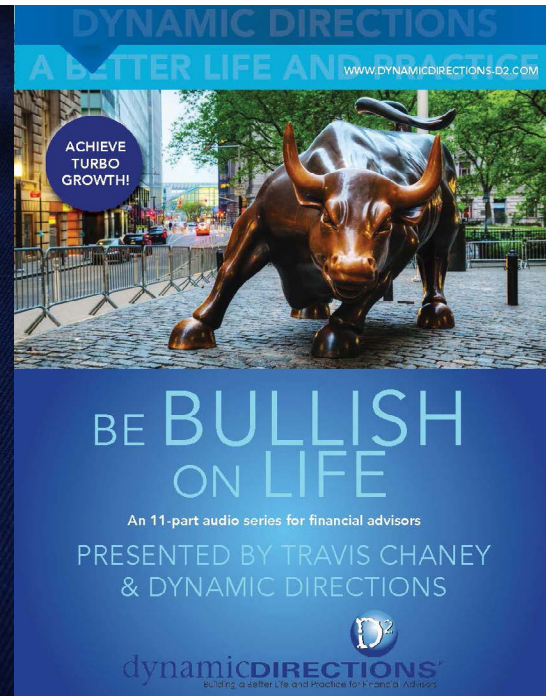
Randy now has a business partner and an executive team - his practice includes nine total people along with a couple of interns. He has worked hard on becoming a better entrepreneur and leader with increased focus, and his numbers show the results of his work - his GDC is up more than 300% and his managed account GDC is up almost 800%.

He and his team now interpret their value correctly so they were able to raise their prices to better match the value they provide. Randy has created a platform for growth by increasing the productivity of his team and becoming a much better marketer - this has enabled the practice to grow by acquiring new clients and performing multiple practice acquisitions.

The future is bright as Randy continues to grow!

RANDY PERKINS TESTIMONIAL:

"Our investment in coaching with D2 initially helped our team to appreciate our value to clients and to raise pricing and productivity while instilling the confidence to make strategic investments in staff and infrastructure to create a platform for growth. Travis and the team have also been instrumental in working through staff challenges and offering a la carte advice to address growing pains and to make smart decisions around investments and practice acquisitions. As an easily distracted CEO and practitioner, the added focus and accountability are another bonus from our work together."



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.