



**SCOTT G.
LEIBFRIED**
Dubuque, IA

INTRODUCTION

Private Wealth Advisor
President, StackStone Wealth
Practice Transformation Began: 2008

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



RESULTS

TOTAL GDC
+907%

September 2009: \$856,000
April 2022: \$8,615,932

MANAGED ACCOUNT GDC
+387%

January 2018: \$1,396,796
April 2022: \$6,804,481

RECURRING REVENUE GDC
+1571%

September 2009: \$504,000
April 2022: \$8,420,898

PRACTICE VALUATION
+1405%

September 2009: \$1,374,000
April 2022: \$20,673,437

WITHOUT DYNAMIC DIRECTIONS

Scott had a book with too many out-of-segment clients, no financial plans, low recurring revenue, and low return-on-assets. He and his partner, though sharing an office together, operated as "silos." Scott wanted to transition from a "jack-of-all-trades" to the CEO of a finely-tuned business.

WITH DYNAMIC DIRECTIONS

With D2's help, Scott is turning goals into results. He has built a team that includes two minority-interest owners and has rebranded as StackStone™ Wealth. Their accomplishments include:

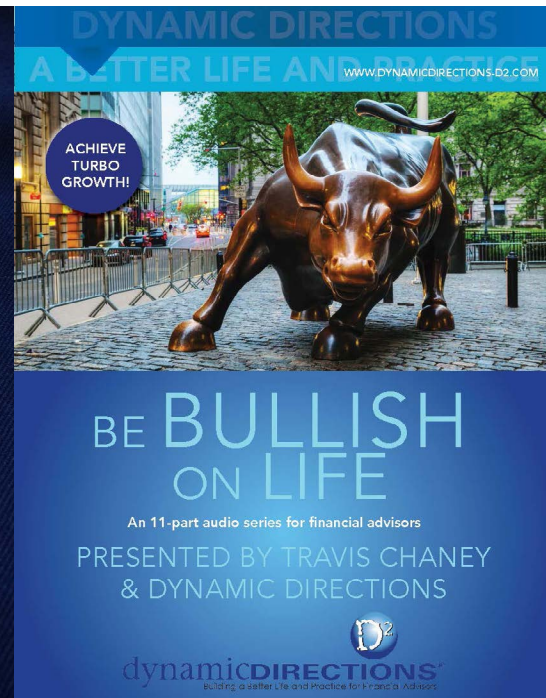
- Clearly-defined team-member roles and responsibilities
- Efficient business workflow processes leveraging today's technology
- A client service model based on segmentation aligning resources with revenue
- A focused marketing strategy
- A menu-of-services distinguishing asset management and fee-based advice services
- A strategic long-term succession plan
- Building out a digital footprint designed to attract prospects and enhance client relationships

In addition, Scott has built a new building for StackStone Wealth and acquired multiple other practices. He is now focusing on the CEO role and acting as a rainmaker for the practice as he implements the entrepreneurial principles he is learning through D2. He is also a coach working with other advisors to reach their business and personal goals.

Scott is also a licensed pilot, and he recently bought a brand new plane!

TESTIMONIAL FROM SCOTT:

“My coaching relationship with D2 has help me think differently than before. By thinking differently, I have been able to drive exponential growth while keeping work-life balance intact.”



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 the book "Turbo Growth; Proven Strategies to Create an Extraordinary Life and Financial Planning Practice."

DYNAMIC DIRECTIONS

Dynamic Directions builds an extraordinary life and practice for financial advisors.

- We work with more than 350 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 tchaney@dynamicdirections-d2.com or visit the Dynamic Directions web site at dynamicdirections-d2.com.