



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

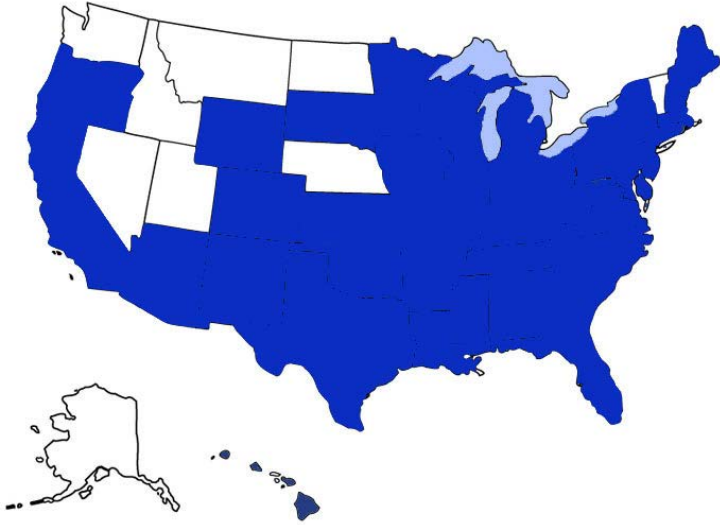
PARTNERSHIP
OPPORTUNITIES
2023

AMERIPRISE FINANCIAL
FRANCHISE GROUP

Thank you for your interest in a partnership opportunity for Dynamic Directions events in 2023! We hope that the summary below is useful as you evaluate this investment opportunity. Please do not hesitate to contact us if you have questions.

ABOUT DYNAMIC DIRECTIONS

OUR CLIENTS

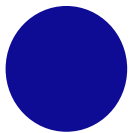


We serve approximately 450+ clients across the U.S. Their locations are represented on the map above. Together our clients manage:



\$177 Million

IN GDC ANNUALLY (2021)



\$22.5 Billion

BOOK OF BUSINESS (2021)

COACHES & CONSULTANTS

Travis Chaney – Franchise Consultant
Jon Randall – Franchise Consultant
Steve Lennick – Coach and Consultant
Sherrie English – Coach and Consultant
Scott Liebfried – Franchise Consultant
Nancy Ainsworth – Coach and Consultant
Michael Brink – Coach and Consultant
Drew Watson – Investment Specialist
Jenna Curtis – Accounting Consultant
Dr. Zach Gerbarg – CEO/COO Development
Katie Humphreys – Digital Marketing Specialist
Joe De Sena – Digital Marketing Consultant
Alanna Morey – Digital Marketing Consultant
Meghann Richardson – Digital Marketing Coach
Amy Schendel – Digital Marketing Coach
Julia Kimbrell – Digital Marketing Coach

DYNAMIC DIRECTIONS PAST EVENTS

November 2022
D2 Live
Nashville, TN
Attendance - 111

November 2020
D2 Live
Nashville, TN
Attendance - 40

March 2019
Think Tank
Nashville, TN
Attendance - 70

November 2021
D2 Live
Nashville, TN
Attendance - 110

November 2019
D2 Live
Austin, TX
Attendance - 135

November 2018
D2 Live
Charleston, SC
Attendance - 125



LIVE EVENTS

For more than 10 years, D2 has been hosting live events for financial advisors and their team members. These events are educational opportunities as well as a chance to build community among our advisors and have a great time.

At a typical D2 event, we support each other, share challenges, solutions and ideas, and come home refreshed. Our focus is building a better life and practice for advisors - we promote a growth mindset that leads to results!

Our annual fall conference is D2 Live in Nashville, where typically 110-125 financial advisors and team members will work on completing their 2024 business and marketing plans. In 2023, we are expanding D2 Live to one-and-a-half-days. During the conference, attendees will spend much of day one interacting with other advisors and team members while learning from top advisors with specific presentations geared to grow their results. During day two, advisors and team members spend the day applying new insights to their practices as they interact with other financial advisors and our D2 coaching team.

Live events give you access to some of the top advisors and practices that you will not find anywhere else. We've seen long-term relationships develop from our D2 events, and getting in front of advisors is the best way to form partnerships.

LIVE PARTNERSHIP OPPORTUNITIES

D2 LIVE - NOVEMBER 8-9

Nashville, TN

PRESENTING SPONSOR - \$10,000

- Recognition as a Presenting Sponsor in conference communications
- One speaking slot of 15 minutes
- An interactive speaking opportunity (such as involvement in a workshop session, a Q&A, or panel discussion)
- Priority booth space, with dedicated booth time
- Two attendees from the sponsoring company at the conference

PLATINUM SPONSOR - \$8,000

- Recognition as a Platinum Sponsor in conference communications
- An interactive speaking opportunity (such as involvement in a workshop session, a Q&A, or panel discussion)
- Booth space, with dedicated booth time
- Two attendees from the sponsoring company at the conference

GOLD SPONSOR - \$4,500

- Recognition as a Gold Sponsor in conference communications
- Official cocktail hour sponsor
- Booth space, with dedicated booth time
- Two attendees from the sponsoring company at the conference

SILVER SPONSOR - \$2,000

- Recognition as a Silver Sponsor in conference communications
- Booth space, with dedicated booth time
- Two attendees from the sponsoring company at the conference

ICE RETREATS

March 22 and June 14-15

(ICE is a small group of 10-15 of our most successful advisors - our retreats offer more intensive coaching along with time for building relationships)

PRIMARY SPONSOR - \$5,000 per retreat

- Network with top advisors on a more intimate level
- Recognition as the Primary Sponsor in conference communications
- One attendee from sponsoring company at the retreat

OTHER EVENTS

Virtual Events

Our interactive virtual events are built for the entire team, so make sure everyone in your office can attend. We feature speakers from outside the financial services industry who offer a different perspective on how to grow your business. Previous speakers have included professional musicians and songwriters, a chef, a comedian, a mental performance coach, wine and bourbon experts, and more. We're currently building our 2023 Virtual Event schedule - contact us to sponsor an event.

Broker-Dealer Events

Dynamic Directions has a presence at other Broker-Dealer-hosted events, such as National Conference. We create opportunities to bring our client community together at these conferences through dinners and outings. While activities will vary by event, they are consistently well-attended by our top clients. If you'd like networking access to this elite group of advisors, let us know that you're interested in partnering with us for dinner or drinks at any 2023 events.

GET TO KNOW OUR EVENTS

Wondering what a Dynamic Directions event is like? Click the links below to get an inside look at some of our favorites.

[D2 Live 2019 - Charleston](#)

[D2 Live 2021 - Nashville](#)

[D2 Live 2022 - Nashville](#)

[2021 D2 Digital Series: Eric Maddox - Empathetic Listening](#)

CONTACT US

DYNAMIC DIRECTIONS CEO:

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270-663-7264

EVENT COORDINATOR:

Meghann Richardson

mrichardson@dynamicdirections-d2.com

270-663-7264

Per broker dealer policy, Presenting Sponsorship opportunities are made available to ALL eligible wholesaler firms. For 2023 Dynamic Directions events, the Presenting Sponsors will be selected based on the first three sponsoring companies to make the commitment for each event.

PARTNER COMMITMENT

Email to Meghann Richardson:
mrichardson@dynamicdirections-d2.com

Please print or type information exactly as you would like it to appear in all published materials. Please complete all sections.

INDUSTRY PARTNER INFORMATION

Company _____
Contact _____
Address _____
City _____ State _____ ZIP _____
Telephone _____ FAX _____
Email _____
Website _____

SPONSORSHIP SELECTION

Presenting Platinum Gold Silver

PAYMENT INFORMATION AND AUTHORIZATION

Please fill out the credit card information below or make checks payable to:
Dynamic Directions, 2708 New Hartford Road, Owensboro, KY 42303

Credit Card Number _____ Exp. Date _____
Name on card _____ CW # _____
Billing Address _____
City _____ State _____ ZIP _____
Amount to charge \$ _____

The undersigned agrees to the charge by Dynamic Directions for the event sponsorship indicated above.

No refunds or cancellations.

Signature _____
Date _____