

DYNAMIC DIRECTIONS

Menu of Services



We are a team of entrepreneurial experts and industry leaders who bring bold, time-tested, results-driven strategies to financial advisors and financial planning practices ready to elevate their game.

WHY SHOULD YOU **TRUST US?**

We work with more than 350 advisors and practices, including

- Barron's Top 1,200 Advisors
- Forbes Best-In-State Advisors
- Forbes Top Women Advisors

We feature 13 coaches to meet your needs

Our clients manage \$119 Million in GDC annually with \$17 Billion in Assets Under Management

7-time Franchise Consultant of the Year

Contact us to schedule your complimentary consultation!



OUR SERVICES

- GDC Growth
- Marketing
- Referrals
- Digital Marketing
- Mergers and Acquisitions
- AFA Coaching
- CFO/Accounting Coaching
- Client Experience
- Client Acquisition
- Client Segmentation
- Operations
- Recruiting
- Pricing Value
- Business Planning
- Insurance
- Human Resources
- Agreements
- Branding
- Developing WOW
- Client Advocacy Board
- Financial Planning
- Investments
- Leadership
- Entrepreneurship
- Team Management
- Hiring
- Developing CFO's and COO's
- Technology Coaching