



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

PARTNERSHIP
OPPORTUNITIES
2025

**AMERIPRISE FINANCIAL
FRANCHISE GROUP**

Thank you for your interest in a partnership opportunity for Dynamic Directions events in 2025! 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 350+ clients across the U.S.
Together our clients manage:



\$160 Million

IN GDC ANNUALLY (2024)



\$22 Billion

AUM (2024)

COACHES & CONSULTANTS

Travis Chaney – Franchise Consultant
Scott Leibfried – Franchise Consultant
Steve Lennick – Coach and Consultant
Sherrie English – Coach and Consultant
Michael Brink – Coach and Consultant
Drew Watson – Investment Specialist
Jenna Curtis – Accounting Consultant
Dr. Zach Gerbarg – CEO/COO Development
Mark Colvin – Technology Coach
Christy Chaney – Co-Director of Digital Marketing
Meghann Richardson – Co-Director of Digital Marketing
Amy Schendel – Digital Marketing Coach
Payton Boyd – Digital Marketing Coach
Kate Horning – Digital Marketing Coach
Kevin Brown – Digital Designer



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DYNAMIC DIRECTIONS PAST EVENTS

November 2024
D2 Live
Nashville, TN
Attendance - 114

November 2022
D2 Live
Nashville, TN
Attendance - 111

November 2020
D2 Live
Nashville, TN
Attendance - 40

November 2023
D2 Live
Nashville, TN
Attendance - 105

November 2021
D2 Live
Nashville, TN
Attendance - 110

November 2019
D2 Live
Austin, TX
Attendance - 135



LIVE EVENTS

For 20 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!

D2 Live isn't just another conference; it's where more than 100 high-performing advisors and their teams come together for a day-and-a-half to crush their business and marketing plans.

On day one, attendees will connect with top-tier advisors and team members, learning game-changing strategies that will take their results to the next level. Day two? It's all about putting those insights into action — collaborating with fellow advisors and our elite D2 coaching team to turn action items into results. Don't miss out on the event that will transform your business.

New this year is **The Growth Collective: Behind the Desk, Beyond the Goals** – an event designed for younger, tenured financial advisors and their rockstar teams who want to elevate their performance and grow together. This event focuses on developing key soft skills, building a growth mindset, and mastering strategy over tactics, with tailored sessions for both financial advisors and support teams. Advisors will leave with a deeper understanding of how to connect with clients, convert prospects, and be better team players, while support teams will gain valuable insights on best practices and collaboration to help drive success.

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 5-6

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

THE ACADEMY - JULY 17

New York City, NY

NETWORKING SPONSOR - \$5,000

- Recognition as the Networking Sponsor in conference communications
- One attendee from sponsoring company

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 2025 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 2025 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 2024 - Nashville](#)

[D2 Live 2022 - Nashville](#)

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

CONTACT US

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Per broker dealer policy, Presenting Sponsorship opportunities are made available to ALL eligible wholesaler firms. For 2025 Dynamic Directions events, the Presenting Sponsors will be selected based on the first three sponsoring companies to make the commitment for each event.