

SARAH DALE

LEADER, CONSULTANT, COACH, AUTHOR, INNOVATOR, SPEAKER

OVERVIEW

Founder of **Know No Bounds** and co-author of *Know Service*, Dale's unique background combines the roles of **business development, service** and **leadership**. Her career has evolved from success working with clients to developing products and programs, implementing strategies for building and leading teams, developing and delivering training and coaching initiatives, creating efficiencies and growing revenues. Fanatical about people, Sarah is a true advocate for clients, associates and shareholders. Her **creativity, communication skills** and **passion to make a difference** add something unique to the individuals, teams and organizations with whom she works.



EXPERIENCE

Sarah started her career in the financial services industry in 1990. Her background includes serving as President of a training and online solutions company, where her responsibilities included creating and managing all areas of a small business that provided **coaching and development services** to financial professionals. Sarah created and delivered business building content, including virtual programs utilizing web-based technology, printed materials, workbooks, e-books, whitepapers, audio visual CD-ROMs, and live seminars. She utilized her skills in developing fresh, actionable ideas, client acquisition strategies, client development techniques, leadership initiatives, and practice management opportunities.

Sarah also served as **director of marketing and training** for Scott & Stringfellow, a regional, full-service investment firm. She served on the management committee responsible for the **strategic development** and management of the firm and was responsible for forming and running the *Creative Business Development Department*. Her overall responsibility included marketing, advertising, public relations, corporate communications, the web, sales incentive programs, and the development and facilitation of training programs. Additionally, Sarah works as liaison between the brokerage firm and parent company developing referral programs and exploring areas of integration. She chaired the Private Client Group's annual sales conferences, *Service Plus* Committee, Marketing Committee, and Training and Development teams.

Today, Sarah serves as President and Founder of **Know No Bounds**, a **consulting, coaching and creative solutions company** serving the financial services industry. Know No Bounds aims to help organizations, teams and individuals make significant enhancements in their business and their life by



generating creative ideas and valuable solutions that produce long-lasting impact ... while having fun in the process!

EDUCATION AND PERSONAL BACKGROUND

Native to the south of **England**, Sarah earned her bachelor's degree from the **E. Claiborne Robins School of Business at the University of Richmond**. She is also a graduate of the **Securities Industry Institute at the Wharton School of Business** at the University of Pennsylvania where she served as senior class representative. Sarah returned to Wharton in 2008 to teach a class as part of the SII curriculum. Sarah holds **series 7, 9, 10, 63 and life and health licenses**. First **published** in 1995, Sarah coauthored "The Question and Answer Book of Money and Investing" and throughout her career has published numerous articles on financial services-related web sites. In 2007, Sarah co-authored "**Know Service,**" **5-Steps to 5-Star Service for Financial Professionals**. Sarah serves as Vice President of the MathScience Innovation Center Foundation in Richmond, Virginia. Currently living in Williamsburg, Virginia, her **passions include fishing, writing, travel, reading, culinary experimentation**, and spending time with her two **four-legged children**. With her family all living across the pond, Sarah is thankful for her friends who have become her American family.

PHILOSOPHY

Sarah is described as passionate, loyal, and unique! Her motto is "*have faith, have fun, and love what you do, for life is too short for anything less.*" Her goal is to make a difference in everything she does and become a true advocate for each and every client.