

# KNOW™ SERVICE



*“Sarah and Krista’s process to building long-term, successful client relationships is the most innovative and comprehensive solution I have seen for the financial community. It is simple to follow and their tools provide a roadmap for immediate implementation! Executing these ideas is a sure way to take your business to new heights.”*

– Millye Gailey Dupke  
Agency Manager  
National Agents Alliance

*Although the content and tools in this book have been reviewed by a compliance officer, please be sure to pass all client communications through your appropriate compliance channels.*

#### Contact Us:

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## Know Service

***Connect with Clients. Shape Your Future. Differentiate YOU!***  
***5-Steps to 5-Star Service for Financial Professionals***

In late 2005, **KNOW NO BOUNDS** and **Paragon Resources** discovered we shared the same vision... to help financial services professionals increase their business, optimize their practices and subsequently make an impact in their lives and those of their clients and firms. Both **KNOW NO BOUNDS** and **Paragon Resources** have a strong belief in the team approach and the importance of maximizing all relationships that impact the success of any financial practice. Our clear synergies, complementary talents and expertise coupled with our joint passion to make a difference led us down the road to a strategic alliance!

Our first collaborative initiative, **Know Service**, is now available! Co-authored by respective Presidents, Sarah Dale and Krista Sheets, this book is intended for **financial professionals** in any phase of their career who are committed to providing **5-Star service** to their clients. Whether you are a financial advisor, financial planner, insurance specialist, junior advisor, sales assistant, or service associate, the content and resources of this book are both applicable and compelling.

This 200+ page *compliance reviewed* book is truly a comprehensive solution to driving sales through service. Included is a 5-step process with dozens of **sample letters, scripts, checklists, and tools** to help financial professionals **attract and retain ideal clients and take their businesses to new heights**. This action-based resource is a unique solution to changing your practice and can lead to dramatic results including:

- ★ An increase in both assets managed and revenues generated
- ★ An increase in asset retention, client retention and loyalty
- ★ An increase in referrals by building client advocacy
- ★ A more efficient practice and team
- ★ Personal satisfaction in doing right by the client

#### Cost: \$55

- ★ Corporate and Quantity Discounts available by Request!
- ★ Workshops, Webinars and Keynote Presentations available by Request!

**Take your business to new heights - contact Sarah or Krista today!**

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**Sarah E. Dale**  
**Know No Bounds, LLC**



**Krista Sheets**  
**Paragon Resources**

## **Sarah E. Dale—Leader, Coach, Author, Innovator, Speaker**

**Overview:** Founder of KNOW NO BOUNDS, Sarah'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.

**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 CDROMs and live seminars. Tools consisted of fresh actionable ideas, client acquisition strategies, client development techniques, leadership ideas, and practice management opportunities.

Sarah also served as a 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.

## **Krista Sheets—Leader, Consultant, Author, Team Specialist, Speaker**

**Overview:** President of Paragon Resources, Krista considers herself a Team Architect and Developer helping financial professionals design team infrastructures for continued success. She consults with teams on partnership viability, identifying team member roles and responsibilities that capitalize on each person's talents, optimizing the team structure for efficient service, and minimizing practice management issues through proven processes. Krista provides an objective, expert analysis that helps successful investment professionals make wiser decisions on the growth of their practices. She is most effective working with teams who have a commitment for excellence and internal firm departments who want to be leaders in the industry.

**Experience:** Krista joined Paragon Resources in January, 1997. New to the investment advisory business, she started from the ground up. Mentoring with Paragon's Founder, Steve Saenz in his training, consulting, and coaching roles, Krista has been exposed to many of the practice management issues that plague the industry. With a desire to solve problems and help people work more effectively together, she focuses her work on helping teams capitalize on their most valuable asset - their people. She has worked with hundreds of teams in all stages of development and with several Wall Street firms building results-driven solutions. In 2003, she became Managing Partner at Paragon Resources and in 2006 became President and Owner. Krista shares her industry expertise by contributing articles and interviews to several industry trade publications and participating in industry conferences, webinars, and discussion panels.

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