

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

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Know Service

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

*"To run a successful advisory business you need many skills, but no matter how talented you are at making your clients money, what they will actually focus on is how you communicate with them when the stock market falls 20%; how many times the phone rings before you answer; how you present the work you have done and how they 'value' your advice. Get these things right and it will give your clients that warm fuzzy feeling inside – the feeling that **you are really looking after them.** You are not an ordinary adviser, **you're an extraordinary adviser.** It **IS** all about service. This book is a phenomenal resource – the authors have recognised that service is how you differentiate yourself and it chronicles the key service strategies you can adopt to ensure your financial firm is 'extraordinary'."*

- Rob Sandwith, Chief Executive, Rosan Helmsley Limited

*"This 'must read' book reveals how to use service to **drive sales, build lifetime client relationships, and bring powerhouse efficiency** in your practice. Sarah's creativity, distinctive background, and industry experience are unique and magnetic! She understands the critical nature of relationship-building in this business and excels at developing inventive solutions and helping others gain new levels of achievement. **Read this book before your competitors do!**"*

- Tyler Carr, Senior Vice President, John Hancock

*"Building and managing a practice is difficult. Today's environment demands that we embrace proactive service and teams to grow and serve our clients successfully and competently. Krista and Sarah are **dynamic professionals** who will help you **produce measurable results** for your team or business while learning invaluable lessons about life and people."*

- Matt Johnston, Athens, Georgia

*"Krista is one of the most **talented 'coaches' in the industry.** Her understanding of our business coupled with her ability to ask the right questions is serving to help **maximize the overall efficiency of our business!**"*

- Carrigan, Paul and Ferguson, Texas

*"Sarah Dale has been a great resource to me in conducting several **successful client sales campaigns.** As a result of her valuable contribution, my **clients experienced a significant increase in assets under management,** as well as a broader brand awareness of their financial account services. Sarah's programs are successful because she delivers the **right mix of industry expertise, creativity, passion, and a 'cracking' sense of humor.**"*

- Laura Deger, Senior Vice President, Federated Investors, Inc.

*"Krista and her team at Paragon have quite literally **changed the way I manage my business.** Their DISC questionnaires and interpretations are a must to help integrate new hires, and they've helped immeasurably in how we problem solve as a team. Each person's unique attributes are valued and it's made **1+1=4.** I now appreciate the balance of skill sets and personality types that makes **our team special and more productive.** I see my career as taking off from the point I learned about Paragon."*

- Mary M. Deatherage, Senior Vice President - Wealth Management

*"There are very few people who I have worked with more accomplished at what they do than Sarah Dale. She is enthusiastic, energetic, intelligent and hardworking. Everyone in this business needs people who have **talent, urgency and passion.** Sarah Dale has all three of these to the nth degree."*

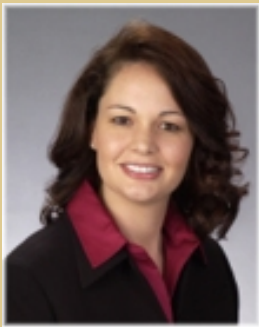
- Walter S. Robertson, III, President & CEO: Scott & Stringfellow, Inc.

TESTIMONIALS

KNOW™ SERVICE



Sarah E. Dale
Know No Bounds, LLC



Krista Sheets
Paragon Resources

“Financial advisors continually look for tools to help them **attract and retain clients**. Typically the unexamined tool is their service model. If you are looking for ‘the edge’ in **service excellence** and want to build lifetime relationships with clients, you must read this book!”

Mike Ball
Senior Managing Director
Scott & Stringfellow, Inc.

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“We have been fortunate to have worked with Krista. She has assisted us with strategic and business planning, professional assessments, clarification of roles and responsibilities, and client alignment. With her guidance, we have taken our business to the **next level of success**. We continue to be **inspired by her knowledge, experience, and passion**. The processes described in this book provide the business world with **proven strategies**.”

- Kaplan, Litwin, Kaplan & Associates. Stifel, Nicolaus & Company, Incorporated

“Sarah is a **results-driven** professional with broad-based experience in multi-disciplinary facilities, encompassing all aspects of sales management, business development, and client relations. An accomplished professional and effective communicator, she possesses **excellent interpersonal and relationship building skills** and is a motivational leader with the ability to build, train, inspire, and mentor successful teams to outstanding performance.”

- Rick Gambriel, Former Director of IT, Regional Brokerage Firm

“Krista has a unique ability to **organize and structure a business**. Krista is tremendous in helping people with roles and responsibilities, which make people more effective and efficient. When executed, **this process leads to an ‘A+’ client experience and more business** as a result.”

- Gene Rice, Director, Practice Management Consulting Group, Morgan Stanley

“**Selling and service are all about passion**. Grab some of Sarah Dale’s passion and your results will dramatically increase”.

John Sherman, Former President & CEO, Regional Firm

“Anyone who knows Krista Sheets of Paragon Resources will tell you that she pulls no punches. She tells her clients – financial advisory teams all over North America – exactly what they have to do if they want to take their **businesses to the next level**. Now, Krista and co-author Sarah Dale, share some of the tactics and techniques that have benefited so many advisory teams. Know Service provides concepts and tools to help advisors build **enduring client relationships** and a “**five-star**” business.”

- Eve Rose, President, Rose Communications, Inc.

“Sarah is more than just a subject matter expert; she has taught us about leadership and living. When you think of Sarah you simply smile; she has **impacted many people for a lifetime**.”

- CIO: Regional Brokerage Firm

“I have worked with Paragon Resources on team building projects off and on for more than 10 years and would attribute much of our harmony and low turnover to their coaching and team building retreats.” - Donald DeWees Jr., CIMA, Managing Director - Investments, Senior Institutional Consultant. DeWees Investment Consulting Group of Wachovia Securities

“I recommend Krista and her program to anyone looking to grow their business. She is extremely talented at identifying the strengths of a team and creating a plan to maximize their potential.”

- Hank A McLarty, President, Gratus Capital Management

“Looking for **success habits**? Call Sarah! Her coaching has made a difference in my business from both a revenue and efficiency standpoint. She focuses on the ‘**actionable**’ not the ‘conceptual.’ Her words of wisdom forced me to commit thoughts and ideas to paper which she then helped me incorporate into my business subsequently making them a regular part of my routine.”

- Investment Advisor: Regional Firm

“There are a few things that some human beings simply will not do, regardless of pay and training. No matter how great the person you are about to hire seems, they are capable of destroying your business, especially if client service is important to you. Krista Sheets and Paragon Resources, Inc have helped us immensely in identifying people who live to serve and helping us **create synergy through recognition of our unique abilities**.”

- Christopher W. Davis, CFP, CIMA, Managing Director - Investments
Davidson Wealth Management of Wachovia Securities LLC, Davidson NC