

# KNOW™ SERVICE



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

*“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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## About the Authors

**Sarah Dale—Leader. Author. Coach. 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 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.

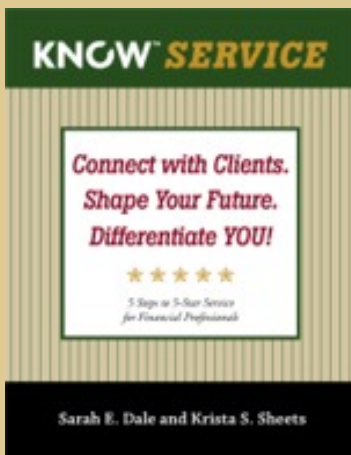
**Educational Background and Publications:** Native to the south of England, Sarah earned her bachelor’s degree from the E. Claiborne Robins School of Business at the University of Richmond. She is also a graduate of the Securities Industry Institute at the Wharton School of Business at the University of Pennsylvania where she served as senior class representative. Sarah holds series 7, 9, 10, 63 and life and health licenses. First published in 1995, Dale co-authored “The Question and Answer Book of Money and Investing” and in 2005 published “Developing Your Wealth Management Dream Team for Long Term Success.” Numerous articles have also been published on several financial services related web sites.

**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.

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



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## About the Authors

**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.

**Educational Background and Personal:** Krista, born and raised in Southern New Jersey, ventured to Boston University where she graduated in three years with a Bachelor of Science in Business Administration. Possessing an entrepreneurial spirit and growing up in a family business, she decided to return to her roots after college to gain more business ownership experience. There, she oversaw all operations of this multi-million dollar business and managed a large staff. From this experience, Krista realized she wanted to learn more about effectively managing and leading people. With a move to Atlanta, Georgia, Krista extensively trained in Human Capital Management and achieved the Certified Professional Behavioral and Values Analyst designations from Target Training International. With her insatiable quest of continuous learning, she continues to train with highly-respected pioneers of employee performance assessment firms to gain additional expertise in this rapidly growing industry. While currently living in Atlanta, she enjoys life with her friends and three rescue cats who all have become her "Southern Family." Her passions include gourmet food, wine, nutrition, travel, and helping stray animals in the community. She is a proud Aunt of Kelsey, Nikki G., and Jack.

**Philosophy:** Krista believes you must live life with passion and everything else will take care of itself! "When we spend our lives doing what we were meant to do, everything else just seems to fall into place." Her goal is to help people uncover their true talents so they can achieve personal success, happiness, and fulfillment.

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