

GROWTH AND PROFITABILITY ARE OUR SPECIALTIES



—XFA.COACH—

eXtraordinary  
FINANCIAL ADVISORS

WWW.XFA.COACH



Jon Randall  
Founder

# OUR MISSION

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BE EXTRAORDINARY

EXCELLENCE. ENTHUSIASM. EXPERTISE.

XFA.Coach - eXtraordinary Financial Advisors is a distinctive coaching and consulting firm committed to providing financial advisors a specialized and proven approach to eXtraordinary growth and profitability.



# OUR VISION

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Our vision is to be the premier coaching and consulting firm for the fastest growing financial advisors. In doing so, we intend to create a positive impact on the industry by shifting the mindset of financial advisors to be eXtraordinary.



# CORE VALUES

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Our core values are guided by the traits and principles of authenticity, transparency, and accountability. To ensure this, all of our team members work with coaches for optimal individual growth and transformation.

Our personal relationships with clients, fellow team members, and advocates are an essential part of our culture. We readily welcome new ideas and opportunities - recognizing everyone in the industry as alliances.

We help Financial Advisors achieve eXtraordinary client growth results utilizing the three E's.

1 EXCELLENCE

We readily strive to improve.

2 ENTHUSIASM

Our mode is high energy, high powered.

3 EXPERTISE

We excel beyond our competitors.

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OUR VALUE

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# OUR WORK

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## COACHING AND CONSULTING

We provide a unique blend of coaching and consulting; utilizing proven strategies that are results driven - coaching clients through to execution. Our clients are the fastest growing financial advisors.

## EDUCATION AND PUBLIC PRESENTATIONS

As a leader in the industry Jon Randall, Founder, is a sought after national presenter and published author. He is committed to financial growth education that makes a positive impact on the community.

## EVENTS AND MASTERMINDS

XFA hosts numerous events, webinars, and masterminds designed to provide accelerated methods for a more profitable practice and proven tools for greater success and financial growth.



## DO MORE WITH CLIENTS

- Client Experience Enhancements
- Investments
- Financial Planning
- Risk Management Solutions

## ATTRACT MORE CLIENTS BETTER CLIENTS

- Target Marketing / Niches
- I.P.O. Referral Method
- Client Advocacy Boards
- Exclusive Events
- Centers of Influences

## MERGERS AND AQUISITIONS

- Acquisitions
- Mergers
- Recruiting
- Leveraging Associate Advisors

# OUR EXPERTISE

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**XFA COACHING PROGRAM**  
Structured Curriculum



**EXPERT COACHING PROGRAM**  
Customized Coaching Plan



**ELITE COACHING PROGRAM**  
Jon Randall



Our coaching programs are designed to grow and elevate your financial advisory capabilities. All monthly programs include a mastermind with expert coach Jon Randall, along with an intensive coaching and workshop session with our coaching team.

# COACHING PROGRAMS

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# ELITE COACHING

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Elite Coaching with expert coach Jon Randall is for distinguished financial advisor practice owners producing over \$3M. If you meet this criteria and are ready to take your business to the next level of eXtraordinary contact us to learn more.

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Jon Randall  
Founder





# TRACK RECORD

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## WE ARE DRIVEN BY RESULTS

In the last 5 years, XFA.COACH has successfully coached advisor practices, helping them achieve eXtraordinary growth of over \$100 million in revenue. Our coaching portfolio encompasses practices with a total revenue exceeding \$200 million.”



# CLIENT SUCCESSIONS



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## DAVE WILSON Wilson Wealth Advisors

In September 2019, Dave produced \$1.2M of annual revenue, learned to become an acquisition guru, and exceeded \$12M of recurring revenue by the end of 2022.

TOTAL REVENUE GROWTH +922% | AUM GROWTH +1,163% | NEW CLIENTS +1,094%

## PETER WILDER Endurance Planning Group

From \$500K of production in October 2016 to over \$5M at the end of 2022, Pete executed ALL growth methods: Doing more with clients, Attracting more clients / better clients, and Mergers & Acquisitions.

TOTAL REVENUE GROWTH +938% | AUM GROWTH +854% | NEW CLIENTS +747%

## TREVOR SHAKIBA Shakiba Capital

In 2009 Trevor was stuck at \$250K in revenue. He implemented organic growth strategies with clients and a targeted marketing strategy that helped him exceed \$2.6M by 2019 without any mergers or acquisitions (10X growth in 10 years). Trevor sold his practice for a record multiple of revenue because of above-average profitability.

TOTAL REVENUE GROWTH +945% | AUM GROWTH +784% | NEW CLIENTS +316%

## CLIENT AFFILIATE FRANCHISE FIRMS





# JON RANDALL

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FOUNDER OF XFA.COACH  
PHD CANDIDATE IN  
PERFORMANCE PSYCHOLOGY

# LEADERSHIP

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Jon Randall has been coaching and consulting the fastest growing financial advisors in the industry since 2004. As a transformational leader, he is passionate about making a positive difference in the industry and has received numerous awards, including Outstanding Leader and Consultant of the Year, and is ranked the #1 Consultant for firms that track results. The average production of practices Jon works with has exceeded \$3.5 million. He is a sought-after national presenter at financial service conferences and published author; his book titled **Attract More Clients, Better Clients**. Prior to coaching, Jon was a seasoned financial advisor where he learned the ins and outs of the industry. Jon is preparing to complete a doctorate in Performance Psychology and currently resides in Greenville, North Carolina with his wife Kathleen and their two sons, James and William.





KIMBERLY HOLUBEC  
Chief Operating Officer



BRANDON HEGG  
Chief Growth Officer



MEREDITH BALL  
Client Success Manager



CHRISTY GROSS  
Chief Client Experience

# OUR TEAM

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Our team of skilled and inspired leaders are here to facilitate an eXtraordinary coaching experience - taking you to the next level of GROWTH AND PROFITABILITY.





JON KUTTIN  
Coach

SUPAL VORA  
Coach

PETE WILDER  
Coach

# OUR TEAM

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Our team of professional and talented coaches will take you to eXtraordinary levels of GROWTH AND PROFITABILITY.





"Coaching is a process that leads to profound mindset-shifts, which then leads to changes in your actions that help you achieve more positive results."

Jon Randall, Founder XFA.Coach



BEGIN YOUR GROWTH JOURNEY TODAY!

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CONNECT  
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