



## **Sarah E. Dale**

Consultant, Coach, Author, Speaker

Founder and President, Know No Bounds

Partner, Performance Insights

---

**Sarah Dale** has a unique background incorporating the roles of business development, service, and leadership. Her financial services career began in 1990 and has evolved from success working with investors to developing products and programs, implementing strategies for building and leading teams, developing and delivering training and coaching initiatives, creating efficiencies, and growing revenues.

As director of marketing and training for a regional, full-service investment firm, Sarah served on the management committee responsible for the strategic development and day-to-day running of the firm. She formed and led the Creative Business Development Department and served as liaison between the brokerage firm and bank parent company developing referral programs and exploring areas of integration.

Drawing upon her diverse industry background, today she serves as a practice management consultant and accomplished speaker. Sarah works with clients to identify performance obstacles and drive their Return-on-Decisions to elevate success and maximize performance. Having held her Series 7, 9, 10, 63, and Life and Health, Sarah brings a hands-on understanding of the challenges teams face today. Through workshops, coaching, consulting, motivational engagements, and content creation, Sarah speaks to audiences on new client acquisition, client development, relationship management, leadership and practice management. Sarah brings practical ideas and specific “how-to” information to help teams identify and overcome their performance barriers and deepen their success. Sarah is actively involved in industry programs and is DISC and Motivators Navigator certified. She co-authored *The Question and Answer Book of Money and Investing* in 1995 and *Know Service- 5 Steps to 5-Star Service for Financial Professionals* in 2007.

Sarah graduated from the E. Claiborne Robins School of Business at the University of Richmond, is a graduate of the Securities Industry Institute at the Wharton School of Business and is DISC and Workplace Motivators certified. Originally from England, Sarah currently lives in Williamsburg, Virginia. Her passions include fishing, writing, culinary experimentation and hanging out with her Pocket Beagle and Toy Aussie Shepherds!

LinkedIn: [linkedin.com/in/sarah-dale-knownobounds](https://www.linkedin.com/in/sarah-dale-knownobounds)