

Linda's important contribution to the financial services industry has been to help thousands of financial advisors become expert facilitators of decision making. During a time of cataclysmic changes in the role of the financial advisor and the nature of the advisory business model, Linda's work has been critical to the success and survival of the many financial services organizations that have engaged her, either in an executive management capacity or as an external consultant.

One of the industry trailblazers, Linda helped to develop the team structure and client approach that many firms continue to seek today. She was a principal in one of the first comprehensive wealth management firms in Boca Raton, Florida during the late 1980's, long before it became a model of choice. Linda's industry entry point in 1981 was a conventional broker dealer, RBC Dain, in her native Sioux City, Iowa. However, it was her unconventional marketing methods (teaching investment classes, writing a newspaper column, conducting seminars for women and pioneering a cable television show) that made her a standout during a time when women were unlikely financial advisors. It is this real world experience that causes advisors today to seek her wisdom, listen and implement what they learn from her.

In 1989, she traded her financial consumer clients for financial advisor clients and has been helping to shape the direction of the advisory business ever since. Linda's career has been a rich blend of personal consulting work and selected "tours of duty" with leading edge financial companies and professional associations. She served as VP Professional Development for Merrill Lynch's Estate Planning Division, Chief Learning Officer for Securian Financial Services and Head of Strategic Marketing for Sun Life Financial. In 2007, she was recruited by Financial Network Investment Corporation to develop and lead its Practice Management initiative. This makes Linda one of the few people who have made a successful impact on multiple financial disciplines – investment banking, life and property casualty insurance, banks – as well as in vastly different distribution systems, everything from captive agents to independent broker dealers.

**Facilitate: the way today's advisors help people make decisions™** is the capstone of Linda's work. Coined "Advisor 2.0" by financial services thought leaders who have experienced its power, the system is diagnostic, predictive and prescriptive in its approach, and its blended learning program was successfully validated inside "gold standard" financial organizations beginning in 1996.

In addition to her expertise in the area of client acquisition, Linda's consulting acumen includes talent acquisition, high performing teams and succession <people> planning. She is a certified Kolbe® consultant and one of a select number of people in the world who have earned Kolbe Master Team Consultant status.

Linda graduated Summa Cum Laude from Bemidji State University, Bemidji, MN, and was chosen for foreign study at Oxford University, Oxford, England, during her senior year. In her "other life," Linda and her daughter/business partner Sara are founders and owners of Firebrand Sports in

Portland, Oregon, a unique studio hailed as “the future of fitness” by local and national media.  
Learn more about Linda’s work and career at <http://peakdevelopmentconsulting.com/>