



Sarah E. Dale

President & Founder, Know No Bounds
Partner, Performance Insights
Speaker, Consultant, Coach, Author

757.258.0008
dale@knownobounds.net

Sarah Dale is a dynamic leader and innovator in the realms of business development, service, and leadership. As the President and Founder of Know No Bounds and a Partner at Performance Insights, Sarah's career is a testament to her versatility and passion for excellence.

Career Highlights:

Trailblazer in Financial Services: Sarah began her career in the financial services industry in 1990, quickly rising from a client service associate to holding all necessary licenses for an advisory role. By 1996, she was pioneering new departments and transitioning to product and marketing roles.

Leadership and Strategy: As the Director of Marketing and Training at a full-service investment firm, Sarah was integral to the firm's strategic development, leading the Creative Business Development Department. Her responsibilities spanned marketing, advertising, public relations, corporate communications, web presence, and sales incentive programs.

Award-Winning Professional: Recognized for her exceptional contributions, Sarah was named "Most Valuable Associate of the Year" in 1999.

Entrepreneurial Excellence: In 2003, Sarah took the helm of a training and online solutions company, creating and managing comprehensive coaching and development services for financial professionals.

Current Roles:

Performance Insights & Know No Bounds: Today, Sarah excels as a practice management consultant and acclaimed speaker. She collaborates with corporate leaders, managers, advisors, and teams to identify performance barriers and implement strategies that enhance success and performance. Her workshops, coaching, consulting, and motivational engagements focus on relationship management, client acquisition, leadership, and practice management.

Speaking Engagements:

Sarah has captivated audiences at prestigious events like Barron's Top Advisory Teams Summit and Barron's Top Women Advisor Summit, where she shares practical insights and actionable strategies to overcome challenges and achieve high performance.

Philosophy and Personal Life:

Sarah's philosophy is encapsulated in her motto: "Have faith, have fun, and love what you do, for life is too short for anything less." A native of southern England, she holds a bachelor's degree from the E. Claiborne Robins School of Business at the University of Richmond and is a graduate of the Securities Industry Institute at the Wharton School of Business.

Sarah is a Certified Generations Professional, is DISC & Motivators Navigator certified, EQi 2.0 certified and AQai certified. She has held series 7, 9, 10, 63 and life and health licenses., Sarah is a published author, having co-authored "The Question and Answer Book of Money and Investing" and "Know Service: 5-Steps to 5-Star Service for Financial Professionals."

Sarah's passions include fishing, writing, travel, culinary experimentation, and walking with her beloved dogs. Residing in Williamsburg, Virginia, she cherishes her friends who have become her American family.

Sarah Dale's commitment to making a difference shines through in every aspect of her work, making her a true advocate for her clients and a visionary leader in her field.