

BRANDI HARVEY
Practice Management Coach
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COACHING PROFILE

I most enjoy launching our service with new clients, working with complex practices or those who need help with staff change, solving complex issues, practice acquisitions or other business transitions. Through my sincere and composed approach, I aim to influence through relationship building, compassion, guidance, and communication. My approach is to view gaps in processes or performance as “symptoms” and to utilize solutions-based thinking to find the cause and resolve the issues.

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| Business Experience | <ul style="list-style-type: none">• Affiliated with Ameriprise since 2006• KMG Practice Management Coach since 2011• Coached 50+ practices, 100+ advisors and staff• 90%+ are PWA Practices• 75% current clients are long-term (2+ years) |
| Areas of Expertise | <ul style="list-style-type: none">• Team Management• The Client Experience• Business Management• Marketing and Acquisition |
| Personal Life | <ul style="list-style-type: none">• Married with 1 daughter and a menagerie of animals• Worthy Matron of Saline Chapter, Order of the Eastern Star• Enjoy outdoor activities, canning, preserving history and travel |

“With all the changes in the industry, with our team, and how we deliver service, I couldn’t have accomplished what we did without Brandi’s great support, coaching, insight and expertise.”

*David Rosenthal CFP®, MBA
Private Wealth Advisor*

“Brandi has the ability to adapt her approach based on her audience’s learning and communication style. She has helped us handle difficult issues ranging from complex process-driven problems to the thorny side of personnel problems. She proactively listens and her upbeat and encouraging words let you know that you are not alone and you have her backing you every step of the way.”

*Craig Donowho, CFP®
Private Wealth Advisor*



KEY MANAGEMENT GROUP



Unlocking Your Potential

BRANDI HARVEY
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KEY MANAGEMENT GROUP



Unlocking Your Potential

ABOUT US

KMG works with practices that desire scalability, net revenue growth, turnkey systems, improved organization, team management, continuity planning, and CEO leadership.

VISION AND MISSION

To be the most sought after provider of comprehensive business solutions for financial advisors. Our mission at Key Management Group unlocks your potential by accelerating growth and driving practice effectiveness.

OUR A.I.M. PROCESS



ASS~~ESS~~

We offer four types of practice assessments to get you started.



IDE~~NTIFY~~

We identify strengths and areas of improvement for your practice.



MAP

We map your needs to our comprehensive set of services to achieve your goals.

SERVICES

Our services work individually or together to provide you with the level of support and style of leadership that you prefer.

- STRATEGIC LEADERSHIP COACHING
- OPERATIONAL PERFORMANCE COACHING
- COMPLETE PRACTICE MANAGEMENT
- HUMAN RESOURCES
- CLIENT MEETING PREPARATION
- FINANCIAL PLANNING
- ACQUISITION & SUCCESSION CONSULTING
- TURNKEY CONTINUITY PLANNING
- ADVISOR LEGACY PRACTICE SALES
- BUSINESS VALUATIONS

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