

Brett M. Macauley, CRPC®
Executive Coach

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COACHING PROFILE

My coaching mission is to assist financial advisors leverage and unlock the power of a successful advisory practice to achieve goals in three primary categories: professional, financial, and lifestyle. My belief is when advisors accomplish goals in these three areas they will experience a life of personal success and freedom. My service facilitates the building and execution of a comprehensive business plan that will turn these goals into reality.

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| Business Experience | <ul style="list-style-type: none">● Franchise Consultant at Ameriprise since 2009<ul style="list-style-type: none">- 20 Franchise Advisors Coached● Tax Professional Alliance Senior Coach, 2015● Private Wealth Advisor, 2004-2016● Field Leadership Positions, 1995-2003<ul style="list-style-type: none">- District Manager - American Express Fin Advisors- Managing Director - Prudential Fin Plan Services- Field Vice President - Ameriprise Financial Services |
| Areas of Expertise | <ul style="list-style-type: none">● Vision & Foundation<ul style="list-style-type: none">- Business Planning & Execution- Behavioral Advice● Marketing & Acquisition<ul style="list-style-type: none">- Tax Professional Alliance Coaching● The Client Experience<ul style="list-style-type: none">- Financial Planning |
| Business Successes & Results | <ul style="list-style-type: none">● Ameriprise Diamond Ring Recipient, 2015● Organically grew and sold \$100+AUM Practice● 98% Client Satisfaction Score |

“During the last four years I have worked with Brett my business has nearly doubled. More importantly it was done so within the context of what I want for my clients, staff and myself.”

-Russell Dunn, CRPC®, Platinum Financial Advisor

“I truly believe working with Brett has significantly helped me grow my practice and profitability. Results are consistently there.”

-Johnny Kovalek, CFP®, Platinum Financial Advisor



KEY MANAGEMENT GROUP



Unlocking Your Potential

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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



ASSESS

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



IDENTIFY

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