

DAVID R. DETJEN, CFP®
Executive Coach

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COACHING PROFILE

My guiding principle is to serve the Advisor as my client with a concierge level service. I offer a customized menu of services tailored to the needs of the Advisor, within a structured service model. Since I am not burdened by running a practice or providing compliance, the Advisor has my total attention.

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| Business Experience | <ul style="list-style-type: none">• Affiliated with Ameriprise since 1985• Served in Field Leadership 1986 - 2005• Franchise Consultant since 2007• Provided leadership to hundreds of Advisors in multiple markets• Have hired, trained, and coached dozens of Private Wealth Advisor practices |
| Areas of Expertise | <ul style="list-style-type: none">• Vision & Foundation• The Client Experience• Client Service & Financial Planning• Business Management |
| Personal Life | <ul style="list-style-type: none">• Married to Gail for 27 years• Daughter Jenny at the Univ of Wisconsin• Lifelong and ardent fan of the Green Bay Packers (owner of multiple cheeseheads) |

"I feel like Dave is a true business partner for my practice. He understands my goals, my business challenges, my resources, and my strengths and weaknesses. He helps me craft and implement plans to move my business forward."

-David Boccignone, CFP®, ChFC®, CLU®, MBA



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