

DAWN MARIE REM
Director of Practice Management
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COACHING PROFILE

My passion is to build long-term relationships with advisors and staff to achieve their goals. Many times, clients know what they need to do - they just need help implementing. I encourage all of my clients to bring their ideas and creativity to the relationship so that we can work collaboratively. I balance my background as a nurse with my determination as a business manager to offer you "compassionate coaching" - patience, understanding, and steadfast dedication to your personal definition of success.

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| Business Experience | <ul style="list-style-type: none">• Over 10 years with Key Management Group• Operations Manager of our own advisory practice, CornerStone Financial Group• Currently coaching advisors and staff in over 20 practices, most of those being PWA's• Worked with more than 50 practices, consisting of more than 100 advisors and staff members |
| Areas of Expertise | <ul style="list-style-type: none">• Vision & Foundation• Team Management• The Client Experience• Marketing & Acquisition• Business Management |
| Personal Life | <ul style="list-style-type: none">• Husband, Nick, Kids: Austin & Sage Mary• Health and fitness advocate enjoying cycling, backpacking trips, multiple half-marathons and an Olympic triathlon |

"Dawn's ability to diagnose and provide proven solutions to our multitude of work related frustrations and inefficiencies has proven to be invaluable." -Andy Goetz, Financial Advisor

"Dawn took the time to connect with me; she really listened to what my values were. She helped me grow, both personally and in business, in a way that stayed true to those values." -Amanda Payne, CFP®

"Intuitively, methodically and effectively Dawn Rem will take you where you want to go." -Dickinson Miller, CFP®, APMA®



DAWN M. REM
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www.advisorlegacy.com

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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

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