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.

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

JOHN SULLIVAN, CFP®
Executive Coach
jsullivan@keymanagementgrp.com

COACHING PROFILE

My expressive coaching style is one that retains the notion that your business is here to serve your life and my role is to help you attain that status. I work with advisory practices that possess a strong moral compass; are growth oriented, coachable, optimistic; willing to take action; and seek reciprocal accountability.

As a coach/consultant, I focus on the 4 signs of a dynamic and successful advisory practice: Plan, Study, Servitude, and Influence. My greatest satisfaction from coaching comes from when a client implements strategies/tactics that ultimately lead them to progress and overall satisfaction.

Business Experience
- Personal Financial Advisor 1981-1989
- Field Leadership Positions 1982 - 2009
- Franchise Consultant 2009 - Present
- Coached/Consulted > 500 practices

Areas of Expertise
- Vision & Foundation
- Leadership Development
- Exit Strategy/Succession
- Client Acquisition
- The Client Experience
- Mergers & Acquisition

Personal Life
- Wife - Joanne, 2 daughters - Erin and Lauren
- Triathlete and overall jock
- St. Joseph Marello Catholic Parish Council President 2014-2017
- Placer County Giving Circle Council Member
- “Bloodsource” Platelet/Plasma Donor

Testimonials

"John Sullivan has been instrumental in helping me to navigate through some challenging situations. He is committed to helping me achieve both my personal and professional goals. He provides guidance and encourages me to explore aspects of my business that would otherwise go unnoticed."

-Christopher J. Olsen, CFP®, RICP®
Private Wealth Advisor
Bridge Pointe Financial Group

"As a result of my coaching relationship with John Sullivan, I am able to better leverage my time to increase revenue and practice efficiency, while ensuring accountability to my goals and objectives. Consequently, I am able to confidently work on my business, while simultaneously working in it."

-Robert J. Roth, CFP®, CFS®
Private Wealth Advisor

"As an advisor and business owner, I came to realize that I was spending all of my time "in" my business and neglecting to work "on" my business. As a result, I found myself feeling drained by my work. I needed to get refocused on what's most important about my business and then develop strategic initiatives to help me reach my goals. John has done exactly that and has been instrumental in a transformational shift that has occurred in my practice. I am more engaged in my business than ever before and am excited about what we are doing for our clients and the opportunities we have to expand our service to even more people. I can honestly say I don't know where I'd be today without him."

-Brian E. Britt, CFP®
Private Wealth Advisor
Britt & Associates

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