

SHANE L. HARVEY, CRPC®
Director of Outsourcing

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COACHING PROFILE

As a coach, I like to focus on personal growth and encouragement. I like to provide a second set of eyes and an alternative thought process to how things are currently done and to help identify opportunities to streamline your business and life. I get the greatest satisfaction from hearing and seeing the “ah ha!” moment that comes from working together.

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| Business Experience | <ul style="list-style-type: none">• Director of Key Management Group’s Outsourcing Department for 6 years• Have coached more than 25 practices on improving internal process and sales around Financial Planning and other services• Worked as an advisor and advisor coach on the P1 platform and as AFA for AFG practices |
| Areas of Expertise | <ul style="list-style-type: none">• Vision & Foundation• The Client Experience<ul style="list-style-type: none">- Client Meeting Preparation- Financial Planning |
| Personal Life | <ul style="list-style-type: none">• Married to wife, Brandi, with a daughter, Alexis, and too many animals to count• Plays golf and softball regularly• Master of Saline Lodge #133, F. & A. M. for the past 3 years |

“I value the relationship that I have with Shane Harvey and the financial planning department as a whole. He and his team always take time to go the extra mile to ensure that tasks are completed to the client’s satisfaction. Shane treats his clients as though he is the owner of the business, and he is an indispensable part of my team.”

-David Betts, CFP®, ChFC®



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