

**STEPHEN BRATTA, CMFC®, AAMS®**  
CFO & Executive Coach

sbratta@keymanagementgrp.com



## COACHING PROFILE

Having worked with advisors for nearly two decades, I've found that the one thing I love most about coaching is helping advisors do for themselves what they do for their clients. My goal is always to help advisors feel that they have a new sense of clarity about their business and that they are confident with their direction. Together we work to establish the goals that matter most to them and a clear path to achieving those goals.

- |                     |  |
|---------------------|--|
| Business Experience | <ul style="list-style-type: none"><li>• Affiliated with Ameriprise since 1997</li><li>• Part of Top Overall Financial Planning Firm at Ameriprise from 1999-2004</li><li>• Joined Ameriprise Financial Consulting Program in 2010, at the program's inception</li></ul>  |
| Areas of Expertise  | <ul style="list-style-type: none"><li>• Improving Practice Efficiency</li><li>• Business Management</li><li>• Practice Acquisition</li><li>• Succession Planning</li></ul>   |
| Business Results    | <ul style="list-style-type: none"><li>• Co-founded KMG in 2005, which has grown from a 2-person operation to a thriving 30+ employee business, serving hundreds of practices</li><li>• Assisted multiple advisors in achieving Chairman Advisory Council Status within Ameriprise</li><li>• Provided leadership and coaching to numerous advisors who have doubled or tripled production</li></ul> |

*"Stephen analyzed our client base, our investment practice and our individual strengths and weaknesses and provided a disciplined methodology for client management. The tracking tools he gave us have led to consistent growth in both our client base and assets under management."*

*-Marjorie Larson, CFP®  
Registered Investment Advisor*



**KEY MANAGEMENT GROUP**



Unlocking Your Potential

STEPHEN BRATTA, CMFC®, AAMS®  
50 W. Big Beaver Rd. | Ste. 175  
Troy, MI 48084

PH: (248) 404-9660x120  
www.keymanagementgrp.com  
www.advisorlegacy.com

For advisor use only. Not for inspection by, distribution or quotation to the general public. Brokerage, investment and financial advisory services are made available through Ameriprise Financial Services, Inc. Member FINRA and SIPC. Some products and services may not be available in all states or for all clients.

## 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.



### IDNITY

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