

**ANTHONY T. WHITBECK, CFP®, CLU®**  
CEO & Executive Coach

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## COACHING PROFILE

I have been a financial advisor since 1989, and an executive coach since 1991. As a business owner myself, my goal is to help advisors develop a CEO mindset. I have coached over 200 advisors, many ranked at the top nationally. Their success generally comes from their ability to think about their practice as a business so that they focus on growth and scalability.

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|---------------------|--|
| Business Experience | <ul style="list-style-type: none"><li>• Affiliated with Ameriprise since 1989</li><li>• Former District Manager, Chairman of the National Franchise Advisory Council, and Chairman of the Branch Managers Advisor Council</li><li>• Registered Principal</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>• CEO of KMG since 2010, which has grown from a 2-person operation to a thriving 30+ employee business, serving hundreds of practices</li><li>• Provided leadership and coaching to numerous advisors who have doubled or tripled production</li></ul> |
| Personal Life       | <ul style="list-style-type: none"><li>• Wife - Anne, Two sons - Spencer and Caden</li></ul>  |

*“KMG offered the services and scope that I was looking for. In addition to coaching, Tony brought tactical systems and processes for my practice and provided ongoing training to my staff. He didn’t just show up with ideas, he became deeply involved and acted like a member of our team.”*

*-Craig Donowho, CFP®  
Private Wealth Advisor*



**KEY MANAGEMENT GROUP**



Unlocking Your Potential

ANTHONY T. WHITBECK, CFP®, CLU®  
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# 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.

## 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



### ASS~~ESS~~

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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