

VICKI WALTON

Relationship Manager

vwalton@keymanagementgrp.com



COACHING PROFILE

My coaching style is interactive. I like working with my clients to step through things together, jointly determining solutions to a challenge or working to improve an already productive team in the way that works best for that practice.

My greatest satisfaction in coaching comes from a plan of action being put in place and witnessing successful results. Most advisors and team members that I work with say that I'm exceptionally detailed. I like to apply this skill to help practices get a greater handle on managing their processes and client service follow-through.

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|---------------------|---|
| Business Experience | <ul style="list-style-type: none">• Joined financial planning industry in 2002• KMG Practice Management Coach since 2014• Coached team members of 25 different practices• Formerly part of a Private Wealth Advisory (PWA) practice with KMG processes and tools• Work experience at three different B/Ds |
| Areas of Expertise | <ul style="list-style-type: none">• The Client Experience• Business Management |
| Licensing | <ul style="list-style-type: none">• Series 7, 63, and 65• Series 31• Life and Annuities |

"Victoria has helped our team assess tools and implement processes in our practice that have improved our efficiency across multiple office locations. Her effective coaching and leadership style makes working with her a positive experience."

*Julie Jones, Operations Manager
The Myrias Group, a PWA Practice*

"Vicki is very knowledgeable in practice management systems, designing workflow and implementing changes. Her support, commitment to excellence and strong communication skills had a positive impact on our overall experience with KMG."

*David A Rosenthal, CFP®, MBA
Private Wealth Advisor*



KEY MANAGEMENT GROUP



Unlocking Your Potential

VICTORIA WALTON
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Unlocking Your Potential

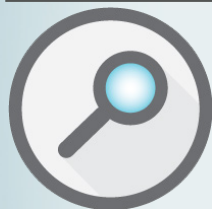
ABOUT US

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~~S~~

We offer four types of practice assessments to get you started.



IDE~~N~~TIFY

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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