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Biography

Kevin is a recovering attorney (with 12 years at NYC Wall Street law firms and in his own practice as a trial lawyer), an accomplished senior manager (ran all Fidelity Investments branch offices on East Coast) and was the number one wholesaler at each of his four companies over 24 years (Balcor, Fidelity, Boston Capital and AIG Sun America). His success came from pioneering a non-commodity, non-product focused approach to wholesaling and identifying a previously undefined advisor market.

He elected to make the delivery of his unique entrepreneurial help and coaching to selected Extraordinary Advisors his priority; sales of his financial product were always incidental to focusing his advisors on their own unique abilities and then naming, polishing and using those skills and processes in the execution of their practices. Kevin's approach resonated so well with advisors who embraced continuous self growth, that in 2000 he named his niche market of coachable reps, "The Extraordinary Advisors".

He credits his 11 years as a continuing Strategic Coach participant for encouraging him to invent his trademarked 8-step non product, practice management approach, "The Extraordinary Advisor Breakthrough Process"™. That process was offered, in his prior wholesaling career, exclusively to demonstrated Extraordinary Advisors who agreed to participate and promised substantial product production.

Today there is a big difference in the context of how he delivers to and teaches others (B/Ds, vendors and wholesalers) to deliver a "Profitable Added Value Experience" to Extraordinary Advisors. He resigned all his securities licenses in September 2008 when he 'graduated' from wholesaler to independent consultant to make clear that his only intention is to help his clients grow their practices and entrepreneurial skills. There is no hidden product agenda. He passionately applies and teaches that process from the podium, at workshops and in



the field to higher-end highly coachable financial advisors with lots of room and desire to grow and those who orbit their practices.

The fact that he thinks like a lawyer, acts like a pragmatic consultant, and speaks like a field-experienced and accomplished financial services coach, make him an invaluable resource to Extraordinary Advisors; for the same reason he is uniquely suited to help B/Ds and RIAs, Vendors, Sponsors and Wholesalers profit handsomely as they endeavor to elevate their support of, sales to, and/or relationship with Extraordinary Advisors.

Kevin's value is creative, articulate entrepreneurial help to coachable advisors and their orbiters. No commodity is involved, only wisdom; he sells nothing: no books, tapes, or autographs. His keen sense of humor facilitates his delivery from the podium and in the field. Kevin lives in Weston, CT and draws his street sense from his Brooklyn upbringing; his grace derives from his greatest blessing, his family, all of whom are successful entrepreneurs: wife Kathy, an RN with an alternative health practice and 3 children, Andrew (Cornell '94), Christopher (U Richmond '04) and Kasey (Boston College '10). Twenty-five year old son Christopher is already a successful external wholesaler for a Tier I VA company in the Philadelphia territory.

Kevin's proven skill is interactive mentor-coaching ("mentoaching") Extraordinary Advisors and teaching their orbiters how to deliver to those advisors a Profitable Added Value Experience. He has been an FPA member, NYS Bar Associate member, a National Speaker Association Member and a rabid NY Mets fan for forever.