Randy Kent, President
Catalyst for Advisors
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Randy Kent, President

Randy Kent formed Catalyst for Advisors for the sole purpose of providing consulting, coaching and accountability services to help financial advisors significantly grow their business.

Working with advisors, teams and managers since 2003, Randy has developed a good understanding of the challenges faced to bring in new clients, grow assets, develop partnerships, and manage team members.

With his natural abilities to coach, motivate and uncover dormant talents, Randy holds each advisor accountable for assignments assuring they stay on track to obtain results that include net new assets, new client relationships, improved client retention and better team dynamics.

Randy graduated from the University of Georgia where he received a BBA in Marketing from The Terry College of Business. Additionally, he studied at The Creative Circus, a leading, post-graduate advertising school in Atlanta, GA.

An avid backpacker and photographer, Randy enjoys living and being active in Big Canoe, a residential mountain community focused on preserving the natural environment and ecological systems. He is a member of the Appalachian Trail Conservancy and the UGA Alumni Association. Randy's photography has been published in Atlanta Magazine.

Helping financial advisors achieve:

- **Higher Compensation**
- **Increase Assets Per Household**
- **Peer Recognition**
- **More Personal Time for Family and Travel**
- **Peace of Mind**

Rita Harrington, Executive Consultant

Knowing an advisor has been helped with growing their business, improving services, or simplifying the work day, are the results Rita strives to achieve as a consultant. Applying over 30 years of training and professional development from positions held at several Wall Street investment firms, she creates easy-to-use marketing and practice management techniques for financial professionals. Rita's experience living and working in the New England, Mid- Atlantic and the Southeast allow her to better tailor Catalyst's platforms to each advisor and the area where they live.

After entering financial services in 1982, and obtaining her securities licenses, Rita worked in the Atlanta area with E.F. Hutton, Kidder, Peabody and J.C. Bradford. During the "tech boom" she marketed employee stock plans as an Assistant Vice President - Marketing with Alex Brown's Corporate Executive Services Group in Baltimore. Rita assisted UVEST Financial Services (now LPL) with the rollout of a new bank investment program in Upstate New York and worked to establish the bank's first clients as their financial consultant. When the retail side of the industry's focus shifted to offering "high net worth services" and "private wealth management," she worked with advisors to sell and administer those products and services through the Merrill Lynch Washington, DC office and the UBS Private Wealth Management Atlanta office.

A native of New York, Rita earned a BA in Economics from the State University of New York at Oswego. Her previous industry registrations and licenses include: Series 7 Registered Representative, Series 65 Financial Advisor, Series 63 State Law, life, health and variable annuity insurance.

Helping advisors with:

- **Team Balance**
- **Client Services**
- **Branding**
- **Advertising**
- **Business Planning**
- **Intern Action Plans**

ADVISORS SELECT OUR SERVICES FOR:

PRIVACY

Your weekly call sessions are not shared with advisors at other firms. The consultant-advisor relationship is private. Your sessions are never out-sourced to consultants at other firms

ACCOUNTABILITY

We hold you accountable for meetings, assignments and action plans to keep you on track toward reaching your goals.

VIRTUAL TEAM MEMBER

We can act as part of your team, collaborating and sharing ideas on what is working. Our neutrality can often be of help to you.

REASONABLE BUSINESS AGREEMENT

Your weekly session is reserved. After each call, you receive a written meeting summary and a list of new assignments. Our services are billed monthly

14 YEARS CONSULTING FINANCIAL ADVISORS

Our understanding of your needs and challenges come from having worked alongside advisors and managers with many of Wall Street's major firms.

30 YEARS OF BRANCH & CORPORATE LEVEL EXPERIENCE

Our knowledge of your products, services, clients and regulations allow us to better service your marketing needs and save you time having to explain terminology and procedures.

PERSONAL SERVICE

We take a genuine interest in seeing you succeed. When you have a concern, we are available to listen.

“Working with advisors around the country, we instruct, guide and motivate to help identify the catalyst needed to significantly grow business.”

CONSULTING PLATFORMS

BUSINESS ESSENTIALS

- Personal Goals
- Time Blocking
- Out of Office Activity
- Pipeline Tracking
- Key Relationships

BUSINESS DEVELOPMENT

- LinkedIn Process
- Advisory Groups
- Natural Markets
- Professional Relationship Building
- Client Referral Execution
- Lunch and Learns
- Social Prospecting
- Harvesting New Relationships

TEAM BALANCE

- Knowing Your Virtual Team
- Better Defined Roles and Responsibilities
- The Team Meeting
- Implementation and Accountability
- Intern Action Plans

BUSINESS ENHANCERS

- LinkedIn
- Triangle Method

COUNTRY CLUB CLIENT SERVICE

- Client Segmentation
- Service Menus
- Managing Client Communication
- New Client Checklist- First 90 days
- Streamlining Client Reviews
- Preparing Heirs

BRANDING

- Differentiation
- The Prospect Experience
- Website Content
- Social Media
- Biographies
- Marketing Packet Content

HOW WE WORK TOGTEHER

OUR CLIENTS INCLUDE:

- **UBS Financial Services**
- **Raymond James & Assoc.**
- **Merrill Lynch Wealth Management**
- **Wells Fargo Advisors**
- **RBC Wealth Management**
- **Independent Advisors**

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