

Are you performing at 100% of your potential?

A coach's role is not to teach you something you don't know. It's to work with you to tap into your innate strengths and abilities and help you get closer to operating at your optimum level.

What is your vision?

Chris Margolin is an executive coach specializing in the financial services industry. He has coached more than a hundred financial executives, giving him the insight that comes from working with high performers who have different styles, approaches, team dynamics, and values. Chris's ability to help his clients step back and develop a comprehensive view of their practice has led to his success as a coach, and to the success of his clients.

Are your activities aligned with your vision?

Chris works with his clients to achieve clarity about where they are today, where they want to be, and what they must do to get there. With each client, Chris establishes a strategy for success and develops a structure with specific accountability measures that will ensure the successful execution of the strategy. The end result is that the clients' activities are in alignment with their vision.

Background

Chris Margolin was born and raised in New York. In 1993, while attending Pace University, he established a publishing company producing college shopper publications and eventually an arts and entertainment monthly, In Magazine. After college, expansion of that venture took him to Boston and then back to New York, where his publishing firm was acquired by a larger company.



In 1998, Chris entered the financial services industry as an advisor at PaineWebber. He enjoyed a successful career—due in no small part to working with an executive coach. Intrigued by his first taste of formal coaching, Chris started coaching new financial advisors himself and discovered that he had a passion and unique ability for the development of others. He became a frequent speaker on business strategy, client acquisition, and self-motivation. In 2005, after reaching and maintaining club-level at UBS Financial Services, Chris left to pursue executive coaching full time. Three years later, he returned to UBS as an internal coach—where he coached dozens of the firm's top performers, including financial advisors, branch managers, product specialists, and regional managers.

Chris departed UBS and returned to the development of his private practice in the summer of 2009.

Chris lives in Florida with his wife Jessica and their son Jackson. Chris is an accomplished photographer, a cyclist, offroad motorcycle enthusiast, as well as a guitarist, and woodworker. He is a member of the International Coaching Federation and student of The International Coaching Academy.

What Chris's clients say about him



“In my 20-year investment career, I have never had a better coach than Chris. He helped me and my team identify our roles and responsibilities, stay focused on our goals, and be accountable to one another (and to him!). As a result, we're having a career year, both in terms of gathering assets and in generating revenues. Chris has become an integral part of our team, and our success.”

—Jonathan Murray, senior vice president–investments, UBS Financial Services
Barrons Top 50 list in Maryland



“I'm in my 25th year in the financial services industry and have been a financial advisor, wholesaler, and branch manager. I can honestly say that going through coaching with Chris was one of the most rewarding things I have ever done in this business. Chris is an excellent coach and is tremendously skilled at getting information that individuals know innately into their conscious thought, where they can use it effectively. He then helps shape what we are already doing—or should be doing—into a clearly defined action plan.

The action plan provides a definable, repeatable, effective, and scaleable process.”

—Ed Hecker, branch manager, director, UBS Financial Services

“We've all heard the clichés about adding value and so forth, but trust me when I tell you that this guy is an unbelievable coach and pays for himself in the form of increased production, efficiency, and attention to detail. I'm on a four-person team,



and the things Chris did to define our roles and responsibilities are, quite simply, things we would never have been able to do without him. Accountability is a challenging component of being a part of a team. Chris really helped us in that area. How? By helping us identify our individual strengths, focus those strengths on revenue creating projects, and, most important, come back to the team to report on the job within a specific time period. That's accountability!

“The last thing I'll say about Chris is that he's a cool guy. He's been in our shoes, so he knows what's realistic and what isn't, and he does a great job of empathizing with our day-to-day experience. In case you can't tell by now, I could not recommend Chris Margolin more highly if you are considering hiring a coach.”

—Brian Doak, vice president–investments, UBS Financial Services

“I've been in the financial services business for 21 years; the last 12 in branch management. During this time I've worked with many coaches, consultants, and partners in efforts to drive productivity. Not until I began to work with Chris Margolin did I fully understand what a professional coaching relationship should look like. Chris is a true pro, with deep understanding of our business and an ability to lead advisors where they want to go.”

—Buddy Buzzerd, branch manager, director, UBS Financial Services



“In working with Chris, my team was able to take a step back and look at our business away from the day-to-day hassles. He helped us resolve internal communication challenges, and he found a way to make us accountable. Chris does not allow the standard: “we will do better”—he challenges us to do things that can be measured.”

—Tom Nelson, first vice president–investments, Merrill Lynch
Barrons Top 50 list in Florida