

Leadership Development & Executive Coaching



What is Your Leadership Style?

These days, leaders in business have to deal with multiple goals and initiatives, while simultaneously creating and sharing their vision and direction for their team, division, or organization. In order to remain productive, leaders must be able to adapt and adjust their approach to accommodate the skill sets of their team members, and the demands of their changing tasks.

One of the keys to being an excellent leader is to regularly explore your values and principles to ensure your actions and behaviors remain aligned with your vision.

How often do you address questions like:

- What are my leadership strengths?
- How do I motivate others?
- How effective is my listening?
- What is the culture I wish to establish?
- How do I inspire others?

Self-examination isn't always an easy undertaking, particularly when you're in the midst of a demanding workload. This is where coaching bridges the gap.

A Proven Approach

As an executive coach, Chris Margolin has worked with numerous leaders and executives, as well as more than 200 financial advisors, helping them to reach their optimum potential. His proven methodology encourages his clients to take an objective view of their actions and behaviors, so they can learn how to leverage their strengths, and make adjustments where needed. By establishing accountability measures, Chris and his clients are able to create a specific structure that ensures successful execution.

The Process

Your coaching engagement begins with Chris gathering information from the people to whom you report, those who report to you, and a select group of your business peers. This portion of the process will focus on exploring your skills in:

- communication
- leadership
- conflict handling
- talent development
- listening



Chris and you will then discuss the findings in an in-depth discovery session. During this time together you will get clear about your current reality and opportunities. The next step is to explore and solidify your goals. Throughout your coaching engagement you will learn to identify and play to your strengths, set and prioritize goals, and capitalize on opportunities. Chris will challenge you as well as hold you accountable while providing you with authentic, objective feedback.

The Engagement

Your coaching engagement structure includes:

- two scheduled phone calls each month
- quarterly face-to-face meetings
- as needed phone and email support between sessions

What Chris's clients say about him



"Chris has been my Executive Coach for over a year. His input has been critical in the direction of my business. He helped me to refine and articulate the vision that I have for my branch and many of the goals that we originally planned for have since come to fruition. His guidance has been invaluable not only strategically but situationally, as well. I often call Chris just to discuss an idea or for his input on tough decisions. His informed and unique perspectives always help me to plan my direction."

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

"Chris has been impactful for me as a coach most importantly because he understands the industry and my role as a Branch Manager. The difference between leading and managing is profound; Chris coaches me to continuously refine my leadership skills and in doing so to make a real difference in people's lives."

- William M. Saunderson, Jr., branch manager, senior vice president investments, Wells Fargo Advisors



"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

About the Coach

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, 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 Jack. Chris is an accomplished photographer, a cyclist, a guitarist, and woodworker. He is a member of the International Coaching Federation and student of The International Coaching Academy.