



**Jennifer Goldman, CFP®**

**Biography:**

Jennifer Goldman, CFP®, is a business transformation specialist. She has 20+ years' experience in the financial services industry and has transformed hundreds of professional services firms into profitable, higher growth businesses. Jen's expertise is in strategic business planning, staff and resource recalibration, tech integration optimization, Lean® process creation, and implementation of operational efficiencies. Her philosophy includes productive collaboration and the IDEOS® mind- set. Her written work can be found in magazines and online, she is published, quoted and has spoken at several industry leading conferences.

**Presentation Theme:**

***Transforming your Business for Growth, Legacy and Profitability***

In this energetic workshop-style presentation, Jennifer provides business examples and demonstrates how to transform your business to grow, empower staff, increase capacity, reduce labor costs, increase client communications and satisfaction, and lower owner burnout.

**Attendees actively participate in two or three interactive exercises:**

- Advisors complete the JGC's Role Responsibility chart® to identify capacity, skill and passion gaps as well as potential owner burnout indicators. We collaboratively identify potential solutions that range from elimination of work due to integrations/automation, intern training program, job description project with staff to the use of outsourced service providers, careers website page, and recalibration of staff into better-suited roles that empower the staff and allow them to "rise".
- Advisors enter a "clunky" process into the JGC Process Template® that helps identify specific missed opportunities to lower the workload. Advisors are given Post-It boards to draft and we work collaboratively to identify opportunities to lower the workload. Processes will range from new client onboarding to lead-2-prospect to investment reporting and financial plan updates.
- Advisors walk through establishing a master plan of business initiatives and thinking through priorities, risk, duration, benefits, champions, and more. We discuss tech implementation projects and the impact on culture, capacity, growth, and other elements of the business.

**Samples of Past Presentations with Interactive Format:**

*Click on video clips below*



**Preferred Audience:**

C-Level Executives of professional services businesses with 2+ advisors, an operations manager, and the willingness to improve the business to boost growth, profitability, and a better staff and client experience.

**Logistics:**

Reimbursement for airfare to/from Boston MA, rental car or Uber, hotel, and speaking fee (starts at \$3,000) that is dependent on time out of office, access to attendees list, and length of session.

**References of Past Presentations:**

Million Dollar Round Table Guy Baker  
FPA National Jeff Tomaneng  
FPA NorCal William Pitney  
Tech Tools Joel Bruckenstein

CSSI/The Exchange Chris Cruz  
FPA Philly Paula Nangle  
FPA Boston Dan Galli  
Insiders Forum Bob Veres

*Click on video clips below*



**Published:**

Technology Tools for Today's High Margin Practice  
InvestmentNews  
Inside Information  
Inc. Magazine  
IRIS

The Trust Advisor  
Technology Tools for Today  
NAPFA  
Journal of Financial Planning  
The Liberated CEO

**Contact:**      [jen@jennifergoldmanconsulting.com](mailto:jen@jennifergoldmanconsulting.com)