



Christy Charise

Keynote Speaking | Workshop & Group Facilitation

Ignite breakthrough growth for high-potential advisors and their teams.

Deliver fresh perspectives, new ideas, and proven methods.

Christy's professional experience at Goldman Sachs & Bain, combined with a Cornell MBA and an elite coaching certification through Tony Robbins, creates instant credibility. And her experience as the COO of a 5-Star Pathfinder Practice, built in record time, creates instant relatability.

Her presentations focus on elevating what leaders and advisors believe is possible, and showing them proven paths to make it so!



christy.charise@nm.com



917-414-8599



strategicadvisor.co

Consider Christy For...



KEYNOTE SPEAKING

Christy is a relatable and engaging speaker whose experience and capability shines through in getting audiences excited about what's possible and eager to get out of their comfort zone to start the journey forward.

BUILDER AND LEADERSHIP TEAM FACILITATION

Raise the bar in your highest potential builder groups and organizational leadership teams with professional facilitation from a certified coach and award-winning strategist.

SMALL GROUP COACHING & STUDY GROUP MODERATION

Make this the year of exponential growth and total fulfillment for elite advisor groups. Custom topics or time period specific moderation packages priced on request.

CUSTOM WORKSHOPS & ENHANCED ADVISOR TRAINING

From confidence and language building workshops to proven content for efficient practice management and process design, Christy is a proven catalyst for helping newer advisors start with the end in mind, and turn a fast start into full speed ahead.



Doug Jones
Denver, CO

"That [session] was awesome! I took a ton of notes for my practice and also for helping my mentees. I can't tell you how much we appreciate today."

- 6 Figure Women's Group Session on Mental Mastery

Recent topics have included:

MOTIVATIONAL/INSPIRATIONAL/MINDSET

Living Your Legacy Requires Knowing Your Purpose

Themes:

- Your legacy will be told through your life, not your lips
- You feel accomplishment by managing outcomes, not tasks
- You feel fulfillment by focusing on growth and contribution, not significance and achievement

Thinking With the Conviction of a 7-Figure Entrepreneur

Themes:

- Adopting the mental mastery of top producers
- Elevating what we think is possible by recognizing and eliminating our own limiting beliefs
- Tactical tips for resilience, focus, and efficiency

STRATEGIC/ TACTICAL – FOR FINANCIAL ADVISORS AND THEIR TEAMS

The Path To A 7-Figure Practice

Themes:

- There are predictable steps to building a 7-Figure Practice
- Knowing what you should be working on at your stage helps pave the path ahead
- Knowing what's ahead helps straighten the road
- A straight, paved road is what enables top advisors to go faster

Prospecting

Themes:

- Why people refer (and why they don't)
- How to be referrable
- Advancing your prospecting tactics as your practice evolves

Building a High-Performance Team

Themes:

- Creating a culture of success
- Motivating others to see excellence as a minimum standard
- Hiring for execution v. leadership and offense v. defense
- Navigating the shift from operator to owner

Have something else in mind? Let's talk!

Custom topics available upon request spanning **Elite Performance, Goal Setting and Achievement, Practice Management, Strategic Growth, and Tactical Tips to Drive Advisor, Team, and Practice Growth**



Kyle Burton
Ogden, UT

"I feel ready to run through a brick wall! LET'S GO!"

- Following a Forum Focus Mastermind Kick-Off Session on Mental Mastery



Meet Christy **CEO | Coach | Speaker**

After earning her B.S. at Cornell University, Christy started her career on Goldman Sachs's Wall Street trading floor. Leaving to pursue an MBA, she was selected as one of Cornell Business School's 26 Park Leadership Fellows, in recognition of professional and academic excellence, dedication to community service, and demonstrated leadership.

After completing her MBA, she joined Bain & Co. as a strategy consultant in their New York office, covering clients in both the general practice and private equity group. She later joined a CT-based, boutique consultancy, Casey Quirk, to focus exclusively on strategy work for public and private asset managers and hedge funds.

Christy joined her husband to build Saugatuck Financial in 2009 and led the marketing, operations, practice management, and growth initiatives of the practice for over a decade. The practice boasts consistent Forum and Eastern Region Top 10 accolades, as well as being named among Worth Magazine's Leading Advisors and NM's Top 20. In 2018, the practice was also named among NM's inaugural Top 10 5-Star Pathfinder practices with over \$1m of annual insurance revenues and ~\$250m of AUM.

Outside Saugatuck Financial, Christy's consulting and coaching work through Strategic Advisor has supported over 1500 advisors nationwide. The work spans from helping advisors in their first 5 years multiply productivity to improving and redesigning top practices and their teams for continued, thoughtful growth. She has also provided strategic consulting, facilitation, training, redesign, and transition support to both MD's and MP's alike.

Christy is a certified life coach through Robbins-Madan's Training, having studied directly under Tony Robbins and Chloe Madanes, and has completed the additional curriculum required for certification as a Board Certified Coach through the Center for Credentialing and Education.

Christy loves living in Westport, CT with her husband, two children, two rescue bunnies, and two mini-golden-doodle pups! Aside from spending time with family and friends, Christy loves traveling, cooking, and a really good cup of coffee (or two).

What Others Are Saying...



Adam Riegel

"Christy's expertise was immediately clear as she had substantial impact on how our team thinks about structure, efficiency, and team development. Anyone looking to grow their practice would be well served to engage with Christy."



Nicole Martocci

"We had the privilege to work with Christy to define the 5-year vision for our network office. Christy's consulting process and deliverables **provided great value. Her deep experience shines through and is further enhanced by her in-depth knowledge of NM systems, values, and processes.**



Adam Sinoff

"What a content-rich hour, and impressive delivery over the phone. With such relevant learnings and observations, **I'm excited to implement several things** from today's [study group] discussion."



Phil Adra

"I have pages and pages of notes, and a much clearer picture of what the best next steps are for my business, specifically around hiring and team/enterprise building.

I highly recommend Strategic Advisor for advisors at all stages who want to grow and push themselves beyond the day to day comfort and routines we naturally find ourselves pulled towards. Christy truly knows our business inside and out and can meet you exactly where you are to help you build a roadmap towards your dream business."



Yalitzza Brambila

"Thank you so much for your sessions. You are so clear and truly understand our work."



Jonathan Aires

"Christy has me re-energized (bc let's be honest – 10-11 years in we can all get a little tired or run down), **focused, excited, and more happy and positive about the career than I've been in a long time... and closing a record year!"**

Let us support your success!







From humble beginnings in an entrepreneurial family in rural upstate New York to an Ivy education and stand-out professional career, to helping build a 5-Star Pathfinder practice from the ground up, Christy brings an approachable style, deep expertise, and an intimate working knowledge of top advisory practices that benefits advisors at any tenure.

Through Strategic Advisor's programs and speaking initiatives, Christy has supported the growth of over 1500 advisors (and counting). She consistently receives 5-star reviews and has been recognized as providing elite-level advisor support by advisors and network leaders across the country. Reach out today to discuss how Christy and the Strategic Advisor team can help enhance your continued success!

References available upon request.

LET'S CONNECT!

 christy.charise@nm.com
 917-414-8599 (c)
 strategicadvisor.co
 based in Westport, CT

LET'S GET SOCIAL!



FEATURED IN:

WESTPORT
LIFESTYLE™

Worth®



Forbes | Coaches Council

