Federer Performance Management Group LLC.
Transforming Visions Into Results

Features and Benefits of the "Working in the Zone©" Coaching Program

The current business environment is ever changing, providing potential challenges to the financial advisor as well as amazing opportunities for accomplishment. In order to capitalize on these shifts in business trends, financial advisors must undergo a parallel shift in thinking. They have to learn to refocus. They must commit to "creating" their business, not just maintaining the status quo. Performance Coaching helps financial advisors learn about and make this valuable behavioral change.

My 25 years of experience working with key executives, business leaders and Fortune 500 companies as a clinical psychologist, consultant, coach and trainer lend a unique perspective to my efforts in the financial services industry. My specific areas of expertise are the Psychology of Money, Wealth Management and Business Consulting. I have successfully coached numerous individuals, teams and groups into maximizing their financial achievement and job satisfaction.

Working in the Zone©

"Working in the Zone©" is a coaching program that can be used with individuals, teams or groups. It allows participants to understand how resistant or open they are to making the important changes in thoughts and behaviors that can lead to the successful realization of their goals. Through this program, I help individuals assess the factors behind their current behavior and identify the necessary steps for behavioral change. More importantly, I am able to break down complex human behavior such as **motivation** and **success** into meaningful concepts and teach specific strategies for achieving both.

Tangible Results

The success of this program most recently was demonstrated by nine financial advisors at Raymond James & Associates. The advisors participated in the "Working in the Zone©" tele-conference coaching group in 2004, and by 2008 a significant majority had *outperformed their peers* in **Production** and **Assets Under Management**. 80% of the participants attained a greater increase than their peers in their level of Production and 70% of the participants had a greater increase in their Assets Under Management. Similar results have Been achieved by individual, group and team coaching clients at Prudential Securities, AEGON/ISI Financial Services, Northern Trust, AmSouth and Bank of America.

Building a Better Future Through Trust

The strength of my coaching and consultative services lies in my committed involvement, my ability to develop ongoing supportive relationships with financial advisors, and my ability to teach the dynamics of human behavior in an understandable way. My clients and I work together in an atmosphere of trust. Previous RJA participants in this program say their willingness to allow me to help them shift their thinking was a key factor in realizing their extraordinary potential.

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"My participation in the coaching group has helped me face both personal and career challenges more effectively. ... I have eliminated time-wasting activities and refocused on important tasks… I have developed more self-motivation and tenacity. Compared to last year, YTD my Assets Under Management have increased by 22% and Production has increased by 6%.
-Anne Bedinger, FA, RJA Orlando

"Since participating in this coaching program, my Production has increased 10% and my Assets Under Management has increased by 14%. …through Dr. Federer's leadership and this program, I have reexamined my thoughts and behaviors concerning the relationship between money and my value system, what I can and can't control and my own self-worth. I feel strongly that this shift in my thinking has directly contributed to my success."
-Kathy Chalcraft, FA, RJA Ponte

"Denise has taught me that success is mental. …I can work very hard to be successful, but negative thinking will collapse my efforts every time. I conclude from this experience that a manager can show you *what* to do, but a great coach will help you believe in yourself enough to try ***and*** succeed."
-Natalie Norman, FA, RJA Michigan.

Format of the "Working in the Zone©" Tele-Conference Coaching Program
This 6-week teleconference coaching group allows financial advisors to participate in an interactive, personalized coaching experience regardless of their location. One-hour sessions occur every two weeks for three months. All participants receive an initial coaching interview with the facilitator before the start of the group as well as a second individual coaching session.

During the program, participants receive information on specific topics from the facilitator and engage in group discussion. Topics covered include individual assessment, values clarification, emotional intelligence, understanding resistance and readiness factors for change, learning behavioral strategies for change and niche marketing.

Active participation, completion of homework assignments, e-mail contact, peer mentoring and following up between sessions increases the likelihood of participants achieving their individual goals. After the initial three-month coaching group, participants minimally continue in a follow-up program that meets quarterly for the next year in order to assess and monitor the progress of individual goals. Participants also can choose to continue more intensively by taking advantage of individual or group coaching.

Individual coaching utilizing the concepts of this program also is available for interested Financial Advisors.

For additional information about this coaching program and other performance coaching, team building and educational/ motivational services offered by Federer Performance Management Group, LLC, please contact m

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