



Kristy L. Gusick

Partner

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About Kristy

I became a partner at Professional Services Marketing LLC (PSM) in 2012 after spending 16 years in various roles in financial services. My experience in business development, marketing, sales and coaching spans the financial services, legal and other professional services industries. I also make time to remain very involved with the Financial Planning Association of Minnesota, and am a member of the Public Relations Committee. The greatest satisfaction I get from my role at PSM comes from knowing that our work is really having an impact on our client's business and, ultimately, in their lives. I really enjoy seeing people learn new things about their strengths that then lead to them gaining more confidence in themselves – and their ability to gain new business for their firm or practice.

When not devoting my attention to helping my clients grow their businesses, I enjoy riding horses, reading and volunteering. You could say that horses and being outside are in my blood, having grown up on a farm in Michigan. And last year, my family and I moved to a hobby farm just east of the Twin Cities where I live with my husband, kids, four horses, two cats and one dog. My girls and I love playing Polocrosse. Polocrosse is a sport played on a horse with a Lacrosse-like racket and a large rubber ball. During the summer, we travel around the country on weekends competing in Polocrosse matches. To make travel easier, recently we purchased a horse trailer which houses not just all of the horses but has living space for the entire family. My family and I are also actively involved in our church, Eagle Brook, where we've been members since 1995.

Perspective

Having started her own financial services business, Kristy knows what it takes on all fronts to succeed. She also helped build two other successful practices and can easily understand the business owner's perspective. She has recruited new talent, hosted numerous successful seminars, brought in millions of assets under management and supported other advisors in doing the same. Bottom line – she knows what it takes to be successful in the business world and understands the essential role sales and marketing play in achieving that success. PSM's proven marketing and coaching process coupled with Kristy's experience is the closest thing to guaranteed success you can find in the sales and marketing coaching world.

Education

- **Bachelor of Science Degree**, Human Development, Career Development emphasis, Colorado State University

Memberships & Accomplishments

- **Member and Chair**, PR Committee, Minnesota Financial Planning Association, 2013 – present.
- Currently serves as a strategic marketing and sales coach to financial advisors and other financial services professionals successfully helping them drive new revenue into their practices
- Founded a successful private investment firm that focused on serving retirees; grew the firm and successfully sold the practice for a profit
- Closed business resulting in multi-millions of dollars in assets under management and coached financial advisors on how to replicate Kristy's process
- Recruited, trained and educated scores of independent investment advisors for a regional investment brokerage firm
- Directed all new business development efforts for an investment firm specializing in private placements such as Tenants in Common 1031 Exchanges, land banking, oil and natural gas energy, and equipment leasing programs

"It's extremely important to me that clients are able to share what is unique about themselves and their practice. Fully understanding a client and developing a clear strategy for marketing is what brings me so much satisfaction in my work." -Kristy

Presentations

Kristy has conducted hundreds of client education seminars on financial planning and wealth conservation strategies. Kristy has also presented to many financial services groups locally and nationally on topics including:

- Using Social Media to Develop your Financial Services Practice
- Compliance Requirements for Financial Advisors using Social Media
- How Financial Advisors can use Social Media to Generate New Business

Network

With her years of experience in marketing, business development and sales within the professional services industry, Kristy has developed a vast and powerful professional network that she often leverages to benefit her clients and their business development efforts. With Kristy, it isn't only what she knows, but who she knows that graces anyone fortunate enough to travel in her circle of influence. Kristy is zealous about meeting new people, nurturing relationships, making connections and creating results. Her personality strengths in these areas empower her work and fuel her desire to help others succeed in business and in life. A competitor in and outside of the office, Kristy takes the same approach to her foxhunting escapades and show-jumping competitions as she does to her client's growth goals – using tenacity, enthusiasm, discipline and confidence to succeed.

*"You are very professional in everything you do, you take the time to get to know us/
our industry, and you are fun to work with!"*

-President, Business Consulting Firm

*"You were able to identify new areas/ways of looking at things and the final product
was very well received by our clients."*

-President, Benefits Consulting Firm

*"PSM has been tremendously helpful in getting me back on track and validating my
own marketing strategies to help make them more effective. Every owner of a
professional services business would benefit from PSM's one-on-one coaching
approach. I have received several referrals for new business because of my more
disciplined approach to referral source communications. Because of my coaching
relationship with PSM, I feel more settled in my everyday routine and confident that it is
working. I have already referred PSM to others and will do so again."*

-Owner, Small Business Real Estate Advisors

*"PSM possesses a unique combination of creativity, personalized hands-on service, and
knowledge of what it takes to build a small business."*

-President, Financial Services Firm



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