

The Kelly Group's Women Professionals: Lessons in Teamwork



From left: Nicole Bengel, Jodi Davis, Kathi Morlock, Kaleigh Parks, Michele Wolbert, and Carrie Anderson. Christine M. Sullivan Photography.

We at The Kelly Group pride ourselves on the strength and effectiveness of our Team. As a firm of financial planners, we use a team approach that helps us provide the highest level of service to our clients.

What makes for an effective team? In an issue celebrating the achievements of women in business, it is fitting to answer this question by recognizing the particular traits of teamwork exemplified by our women professionals. An effective team requires talented and dedicated individuals who are:

- Given the opportunity to grow professionally,
- Treated as peers,
- Committed to a common vision,
- Provided with autonomy and flexibility,
- Supportive of other team members,
- Able to mentor and train new team members.

You can see these traits in The Kelly Group women professionals: Michele Wolbert, Jodi Davis, Nicole Bengel, Kathi Morlock, Carrie Anderson and intern Kaleigh Parks.

No one exemplifies the opportunity for professional growth at The Kelly Group more than Michele, who serves as Vice President of Administration, and as such manages the office and its people. She joined the firm in 1999 as a bookkeeper for the firm's accounting clients but over the years has grown into her manager role. "Initially, they just relied on me for anything that needed to be done," she says. Her responsibilities grew over time. "As we had more people, it just

seemed natural that I manage them." And from the moment she started here, she was struck by how Bryan Kelly, the founding partner, always treated her as an equal. "He was and still is my mentor," Michele says, setting an example for her and other team members who all do their best to help each other succeed.

Effective teamwork also requires a common vision. Jodi Davis, Principal and financial advisor, personifies The Kelly Group vision of a holistic and relational approach to financial planning. Jodi came to The Kelly Group in January 2009 when she was an executive in the banking industry. As an advisor, her biggest strength is listening. "I let clients talk about family and what's most important to them, and weave what they say into their goals and overall planning discussion."

Another vision of The Kelly Group is to serve as a community asset, in part by providing financial literacy and education. Jodi is a standard bearer in that regard. On top of her busy schedule providing advice to clients, Jodi speaks and teaches widely on financial issues, and conducts a popular "Savvy Woman" series at Harford Community College.

Nicole, our Director of Client Services, sets an excellent example of responding steadily and effectively to a multitude of issues and tasks. As a member of The Kelly Group since July 2008, Nicole calls herself a "Joan of all trades". She provides support for client service staff and the operations area, plans the complex logistics for client events,

helps address compliance issues, monitors correspondence coming in and out, assists with licensing and travel plans – and fields anything else that comes along. To be good at her job, Nicole says, she needs to be able to switch gears quickly, which "keeps it new and exciting." "There's never a dull moment," she says.

Kathi, as Operations Manager, shows us how one team member can provide invaluable support to every other member of that team. Kathi, who joined The Kelly Group January 2010, manages the paperwork and other facets of our client service operations. Daily she works to solve operational challenges faced by The Kelly Group's advisors and financial planning associates. She is unflappable in her continuing efforts to solve the seemingly unsolvable. "I've never had a thought that I can't handle a challenge," she says. "If it's complicated, give it to Kathi because she can figure it out."

And good teamwork requires the ability and willingness to bring on new team members and seamlessly incorporate them into the operations. Carrie's first day as a client service administrator with The Kelly Group was just this past Nov. 11. And she already handles her job like she's been doing it for years, quickly grasping The Kelly Group's culture of excellent client service. For example, Carrie's motto is: Answer the phone with a smile. "You don't know what you're going to hear on the other end," she says. "You could make them happier just by listening."

As our latest intern, Kaleigh is impressed with The Kelly Group team. Kaleigh, who has taken to the many responsibilities of her four-month internship like a natural, is upbeat about the future for women professionals. In fact, she encourages her 7-year-old daughter, Lorelei, to feel that "the sky's the limit." That's appropriate advice for Lorelei, who wants to be an astronaut.

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