

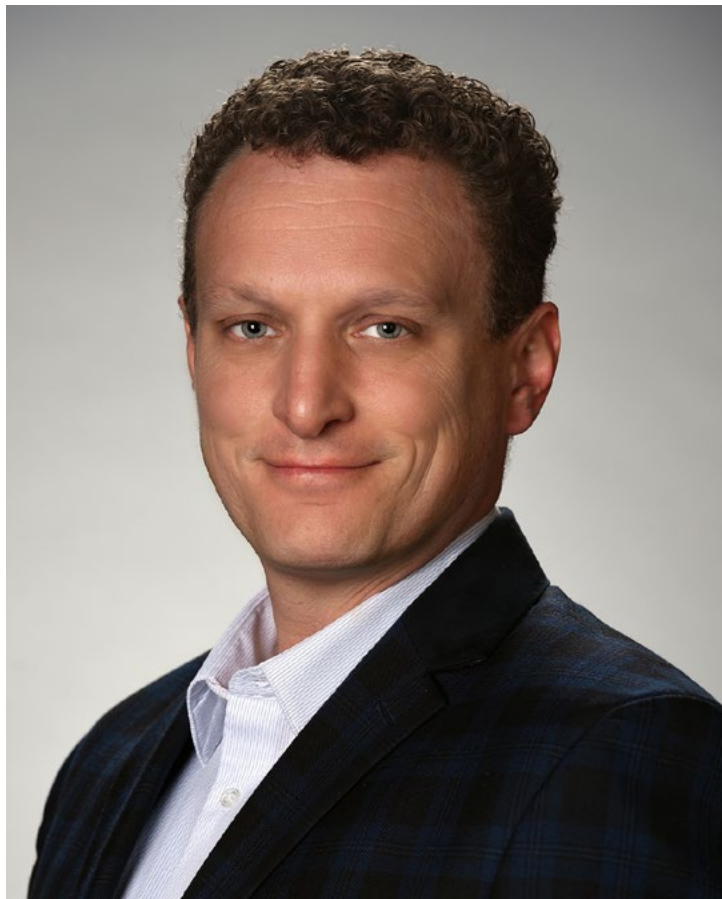
JAMES MACKIEWICZ

With over 20 years invested in the financial services industry, James Mackiewicz has spent much of his career working with a variety of companies, both small and large, to help them develop more advanced leadership practices. In order to attain a deeper understanding of the similarities and differences between them, he personally visited the offices of numerous managers and employees. Then, in 2007, he began to garner direct experience in leadership development by assisting business owners and financial advisors who were interested in maintaining and growing their businesses. James is passionate about his work and enjoys helping clients across the country to identify and implement best practices that will ultimately lead to their success.

Because practice management has continued to evolve as a necessary discipline, the ideas and implementable content are desired across the industry. Therefore, James has amassed experience both as a trainer and as a presenter focusing on succession planning, marketing, human capital, and a variety of other areas that guide successful practitioners to become equally effective business owners. In order to gain a better understanding of the needs of institutional providers as well as individual advisors, James has not only attended both small and large group meetings, awards conferences, and several best-in-class groups, but chief executive officers and advisors have also invited him to present information before these same audiences.

James' desire to create lasting changes in the business world recently led him to become affiliated with Crestcom International, LLC, a global leadership development company headquartered in Greenwood Village, Colorado. With interactive learning courses offered in 22 languages and in over 60 countries, Crestcom has been providing business leaders with the support, training, and tools they need for over 30 years. In fact, Crestcom currently offers one of the most successful and widely used training programs among Fortune Magazine's Top 100 Companies.

The Crestcom model helps key decision makers, business owners, and managers to become better leaders by implementing three elements of effective behavioral change: measured development, an implementation plan, and accountability. Their unique approach to training includes live facilitation, instructional videos with subject matter experts, and facilitated interactive exercises. Most importantly, every training module ends with an action



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plan to ensure each participant takes the information and incorporates it back into their company. "Since my personal mantra in this area has always been Training, Implementation, and Accountability, I knew Crestcom was the perfect fit," says James, "When people change the way they lead, they soon begin to see increased sales and accelerated growth."

Prior to his association with Crestcom, James launched his own business, DoMore Consulting Company, after working for one of the industry's largest turnkey asset management programs, which is one of the nation's largest independent practice management firms. There, he was responsible for helping advisors and business owners create effective succession plans, streamline operations, sharpen the investment management process, and enhance human capital support. Earlier in his career, James also served in various management, production, and training roles with TD Ameritrade and Bank of the West.



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