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May 28, 2013

Michelle Friedman
21 Brookline Road
Scarsdale, NY 10583

Dear Michelle,

Thank you for working with the Gerstein Fisher leadership team. The team found your techniques around communication, organizational models, team formation, and goals and priority setting extremely useful. Your expertise and guidance at our off-site helped make the team feel comfortable enough to have an open and honest conversation and prioritize the work that needs to be done.

Sound leadership is important to any business and is even more critical in organizations with lofty growth goals. Your technique of gathering data and classifying it into an organizational model that the team can use to prioritize initiatives was very helpful. Within just three weeks after the off-site, the Leadership Team rolled out a Sales Dashboard and developed a system to track referrals, both of which impact the bottom line.

Finally, teamwork and client service are core values for our organization. The Leadership Team found the discussion about internal clients empowering and it has had an immediate impact on our weekly meetings. These meetings have become more interactive and productive, with members asking for help and sharing best practices across the organization.

Thank you again for taking the time to work with us. We are excited about the strides we have made and will continue to make organizationally with the help of your excellent coaching. We look forward to working with you again in the future.

Sincerely,

Gregg S. Fisher, CFA, CFP®
Founder & Chief Investment Officer