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JULI McNEELY
CONSULTING LLC

Media Kit



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Juli McNeely wrote her first book *No Necktie Needed: A Woman's Guide to Financial Services* with the goal of attracting more women to choose financial services as their career. Sharing that message within the industry, she encouraged women to reach ever greater success.

Now, Juli coaches women and men in many different professional services industries. Her candid, caring style aims a critical mirror at industry paternal structures and empowers individuals. Juli redefines how women and men think, train, and act in professional workplaces. Juli McNeely Consulting shows that confident women really can make an impact!

Read her full biography at <http://www.julimcneely.com/the-author>

What Others are Saying

“ Juli’s approach to coaching brought me and my company immediate benefits. In her initial evaluation, I received meaningful information and feedback that I could act upon right away—and during our work with Juli, that stream of meaningful, useful information has remained constant.

Better yet, all of us who work with Juli continue to see concrete, constant benefits: we have a better understanding of how we think, how we process information, and we can now zero in on the best approach to resolve the challenges of our growing agency—and in less time. Truly transformational! ”

-Mark Acre, CEO, OneSource Insurance Group

“ You don’t have to give up a family to have a career, or vice versa. In *No Necktie Needed*, Juli encourages her readers to learn how to balance life and work, and that you can be a woman in the industry and be just as successful as any other male counterpart. ”

-Tom Hegna, CLU, CHFC, CASL, Speaker and Best Selling Author of “Don’t Worry, Retire Happy”

Why Coaching?

Have you reached your **fullest potential** yet in your career?
What's holding you back?



Every day we are running fast toward our future success. Sometimes we are running so fast we forget to stop and set a strategy for optimal performance and that in itself can slow our progress greatly.

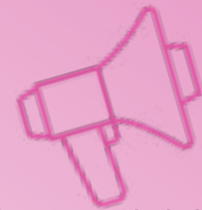
A **coach** can help by being a **sounding board** and an **accountability partner** on the journey. A coach can push you and stretch you beyond where you knew you could ever go.



Your coach will work with you to identify clear goals, strengths, and long-term plans.



A coach brings the best out of you, and she supports you to achieve success, continue growth, and find balance.



Coaches are optimistic and will assist you in creating a positive environment that fosters success!

Individual Coaching



With an individual coaching program we will focus on your strategic planning, writing a business plan and tracking your progress. We will also focus on process improvement, branding and marketing, and client engagement strategies.

Juli McNeely Consulting conducts coaching calls virtually using Zoom so you can connect face-to-face digitally! A standard coaching program contract involves 12 months of consultation, where Juli will coach you directly once per month for about an hour.

Pricing Plans:
\$1,000 Monthly or
\$9,000 Annually



Team Building

Group Coaching & Keynotes \$1,500-\$3,000 + travel expenses

Do you work closely with a small group? A group coaching program can enhance your ability to work together toward your combined goals. This can be great for study groups or small businesses trying to overcome the mundane nature of the status quo and break past “business as usual” tendencies. With a group coaching program we will focus on your strategic planning, writing a business plan, and tracking your progress. We will also focus on process improvement, branding and marketing, and client engagement strategies. Together, we will design a personalized coaching schedule that fits the group’s needs.

Keynotes Presentation Topics

- “Habit Plus Process Equals Success”
- “Success on Purpose”
- “Game Changers: Taking it to the Top”
- “Perfecting the Practice”
- “No Necktie Needed”

Strategic Team Workshop Contact Juli for Pricing

Is your entire team on board with the firm’s success goals? This session is designed to include the entire team and will focus on writing individual business plans to achieve cumulative firm results. Having the entire team part of the strategic process can only help obtain buy-in and allow the firm to reach new heights. Consistent accountability also improves since each team member has listed their objectives for the year. It’s time to get your entire team working together to ensure everyone wins!



Prep Calls

- Juli will connect with upper management to identify what your workshop will include.
- Juli will collaborate with you to customize her presentation(s), any activities you’d like to include, and cater the overall event pre-planning and execution to your needs.
- Workplace culture will be evaluated to ensure the workshop is productive.



Personalized Workshop

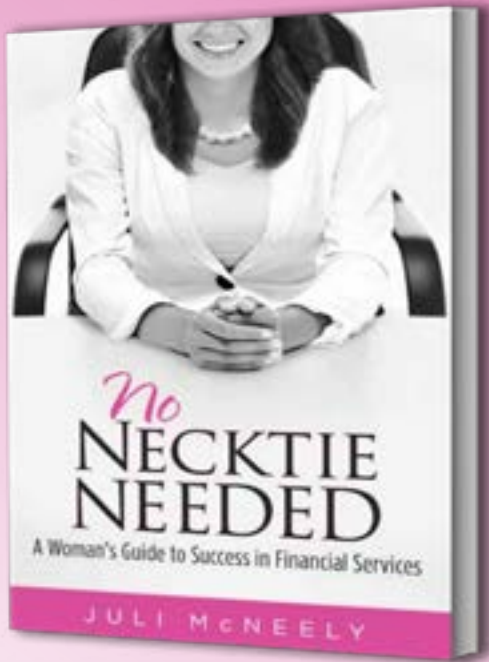
- Juli will deliver one of her signature workshops personalized for your team.
- Juli’s interactive presentations are customized in duration and are designed to keep attendees engaged.
- Evaluations, surveys, and general feedback forms can be included at your request to ensure your team gained something from the investment.



Goal Tracking

- Juli will connect with you to evaluate the overall event and establish next steps for your business.
- Workshop attendees will attend a follow-up video conference call to share their personal victories, review the knowledge they recently gained, and stay on track with the group’s goals.
- Juli will continue to design and track additional items to be covered at a future workshop if agreed upon by upper management.

No Necktie Needed



Imagine being a highly-valued part of an industry that lets you use the skills and attributes that come naturally to you as a woman to earn an exceptional living and spend ample time with your family, all by helping others find more security and greater peace of mind for theirs.

Written in her candid, incisive, no-holds-barred style, *No Necktie Needed: A Woman's Guide to Success in Financial Services* makes the industry accessible to women in search of a strong work-life balance and who seek to define and measure success by their own standards.

Much of the financial services industry relies on prehistoric, paternal training and language. In this 136-page read, Juli covers:

- The Flexibility Factor: Financial Services Lets You Balance Your Roles Like No Other Career.
- Women Make Great Leaders, Too.
- Why Women Function Better With a Team
- Saying No to the Negative Voice in Your Head
- And 7 other chapters!

What Others are Saying

“ This book is readable, relatable, and doesn't rely on confusing or technical language. It's an important read for everyone, especially women, considering a career in the industry. Juli does a great job capturing ways in which you can truly help your clients, which is what this career is all about. ”

-Caroline Feeney, CLU®, ChFC® President, Prudential Advisors
Prudential Financial

“ Juli's book is a wonderful reminder that our profession can be customized for each person's strengths and vision. I was touched by her candor about her struggles and it reminded me of many of my own. Her message of survival, focus, self-talk and teams give all of us more tools to move through the rough more quickly and get to more of those 'bursting moments'. ”

-Michelle Hoesly, Past President of MDRT

Accomplishments


- Juli McNeely, LUTCF, CFP, CLU, is president of McNeely Financial Services in Wisconsin, an independent agency founded by her father in 1974.
- In 1996, Juli entered the financial services industry, and she currently holds the Series 7 and 63 securities licenses through Woodbury Financial Services.
- In 2011, Juli was the recipient of the NAIFA Wisconsin A. Jack Nussbaum Distinguished Service Award.
- In 2013, Juli was named one of the “Top 20 Women You Need to Know” in insurance by LifeHealthPro and has been interviewed by the Wall Street Journal, Investment News, Reuters, Insurance News Net, and National Underwriter.
- In 2015, Juli was awarded the Women in Financial Services (WIFS) “Woman of the Year” award.
- Juli McNeely was the first ever nominated female president of the prestigious 140-year-old National Association of Insurance and Financial Advisors (NAIFA) organization. She is still professionally affiliated with NAIFA today.
- She is also an active 13-year member of the industry’s Million Dollar Round Table.



Get in Touch

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