

## The Great Eight featuring Mike Doucette

*There are many people at Kelly Financial Services (KFS) who help deliver consistent, friendly, and timely day-to-day service to our clients. We want to recognize them. Going forward, we will showcase a member of our client experience team as they share some insights about what motivates them and some of their interests outside the firm. In this issue, Jim Freeman, our chief marketing officer, sits down talk with Mike Doucette, our newest team member and our chief operating officer.*

1. **Jim:** Mike, welcome to KFS and welcome to the new feature section of our newsletter. Tell us a little bit about your career before KFS.

**Mike:** Jim, it's great to be part of the team. I started my professional career in 1996 as a financial analyst with a large mutual fund company in downtown Boston. I was able to gain invaluable experience during those early years, much of which I still apply today. Ultimately, I wanted to work more closely with clients and that's when I made the change in 2004 to become a financial advisor. Over time, I have grown to include management among my skill-sets -- in addition to the advisory side. I believe my background fits this new position well. I am very excited to be here.

2. **Jim:** Why KFS? What attracted you to the company?

**Mike:** One of its core values is family values and that really struck a chord with me. Many firms talk about them but very few, if any, believe in them let alone live them. KFS does both and has done so for a long time. There is a trust factor here. Not to mention the team approach to solving problems. And I appreciate that the firm still pays homage to the ideas and principles of the late-Bill Kelly. I want to help not only to preserve those ideas but also help grow the business. And I think the firm sees the future the way I do, too.

3. **Jim:** That is a great segue to my next question. What would you like to accomplish here?

**Mike:** Continuing Mr. Kelly's legacy, for starters. But I also want to provide our advisors with the very best tools available, to allow them to best meet, if not exceed, our clients' goals and objectives. With regard to the future, I see us becoming more and more engaged in the planning side of our clients' lives. I think that is where we can bring the most value in the future.

4. **Jim:** You have been in the financial services/advisory space your entire career. What has changed since you first entered the business nearly 25 years ago?

**Mike:** That's a great question. The simple answer is everything! Obviously, the technology has changed tremendously. But perhaps the biggest change is how the advisory business has evolved. When I first started, clients used to measure success if their portfolios hit certain benchmarks. So, if you beat the S&P 500 that was considered a great year. Now, performance is not necessarily the end goal but a means by which to reach an end goal. By that I mean we are now much more goal-oriented than we were 25

years ago. We talk much more about goals. So we use software tools and financial products to build certain portfolios that aim to achieve very specific goals. Today, hitting certain benchmarks is fine but that is not the definitive sign of success. I see the business now migrating from less of a portfolio-minded model to more of a planning-based model. And I think KFS is poised for this change as well. That is exciting to me and should be exciting to all our clients too.

5. **Jim:** What's been your experience like at KFS so far?

**Mike:** Lot's of work and lot's of fun. I am really enjoying meeting some of the clients who have been with the firm for a decade and even longer. I look forward to meeting more and more clients over the next weeks and months. And I am also really enjoying meeting the prospective clients who have inquired working with us. It is all a testament to the firm building long-lasting relationships with people. And, of course, the team has been terrific. They have been welcoming and professional and have helped get me acclimated in short order.

6. **Jim:** Let's switch gears for the last couple of questions. We're sitting in your office. I see a lot of pictures of hockey players here. I don't see Orr, or Esposito or Bourque, but I see three young men in hockey gear so who are they and what's the story?

**Mike:** Those are my three boys, all hockey players... all working to be the next Orr, Esposito and Bourque! Like a lot of sports today, you pretty much play year-round. They're teenagers now and have been skating since the age of four. We've spent countless hours at rinks throughout New England and have created lot's of great memories and have established lot's of friendships along the way. Many, many mini-cookouts in parking lots at city and municipal rinks. As a hockey family we tour New England quite a bit. It's a big-time commitment but it's also rewarding for all of us.

7. **Jim:** Wow. You are a busy man. Safe to say you don't have much leisure time. What hobbies or other interests do you have when not touring the great hockey monuments of New England?

**Mike:** I know this might sound a bit out there, but I honestly do enjoy working around the house, especially the yard. In fact, my family would say that I am a bit crazy when it comes to lawn care. Ever since I was a kid, I've always enjoyed mowing a well-manicured lawn. [Shows Jim pictures of his yard] But during the winter you'll likely find me in the garage or basement working on some home improvement project.

**Jim:** That is some yard! It belongs in a commercial. I'm calling you to get my lawn looking that good...

8. **Jim:** OK, here are the tough ones. Favorite: meal, movie, and music?

**Mike:** Turkey dinner with all the trimmings. Shawshank Redemption. Yacht Rock... otherwise known as soft rock from the 70s and 80s, with that signature sound and production.

**Jim:** Thanks for your time, Mike. Its been fun and again, welcome aboard!

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