

Leadership in Action

FPA members inspire others in many ways, helping lead in their practice, local Chapter, community, family and especially, with their clients. FPA Leadership in Action helps highlight these "everyday" qualities of our members and remind us that we all have opportunities to lead.



NAME: Gayle Colman, Member since 1997

COMPANY: Colman Knight Advisory Group, Carlisle, Mass.

Helping Advisers Deal with the Aftermath of the Great Recession

A Leader in the Profession

Gayle Colman is a financial adviser and also coaches a select group of advisers around the country. At FPA events in 2009 and 2010, Gayle was on the lookout for advisers who clearly needed help weathering the severe economic and emotional aftermath of the Great Recession. "Gayle has intense emotional radar" said one FPA event attendee. "She can tell when an adviser is at his or her wit's end, struggling with too many balls in the air or just trying to make sense of the crazy world around them."

At several of these events, Gayle provided "listening therapy sessions" for overstressed advisers; sometimes she just provided an empathetic ear to those facing other challenging issues in life. "Gayle may have saved my marriage," says another FPA conference attendee. "I was letting my work stress spill over into every area of my life, and I needed an intervention. Gayle listened intently and helped me recalibrate my values." Gayle lives what she counsels. She loves family, travel and adventure, gives generously to her community, takes leadership roles in her faith community, develops and launches programs and training initiatives for organizations and serves her local FPA Chapter in several capacities.

Lessons Learned

- Be open to helping others in distress no matter where you find them
- Hone your leadership skills at industry conferences and workshops and be prepared with the right questions to guide those to their own best solutions
- Even experienced professional advisers need help making sense of a fast-changing world

Gayle's Leadership Portfolio

Gayle is on the board of FPA of Massachusetts and currently serves as its chair. She is a Certified Integral Coach™ with Integral Coaching of Canada and a certified coach with the Hendricks Institute. She is a CFP® practitioner with nearly 30 years in the industry.

“Life fulfillment is helping our clients understand the interior aspects of money (family rules, beliefs, patterns) and the confusion they create, and then guiding them to new clarity in their life.”

