




# Legacy

LEADERS

## LEGACY LEADERS

the premier CEO coaching + mastermind group  
for multi-million dollar business owners.

THE  
**Business  
Advisory**

Brought to  
you by 



# THE FOCUS

We help maxed out founders transform their businesses into self-led, scalable, and sellable companies – so they can exit for a premium and build generational wealth in the process.

**Curriculum includes:**

Recruiting, hiring + onboarding

Leadership

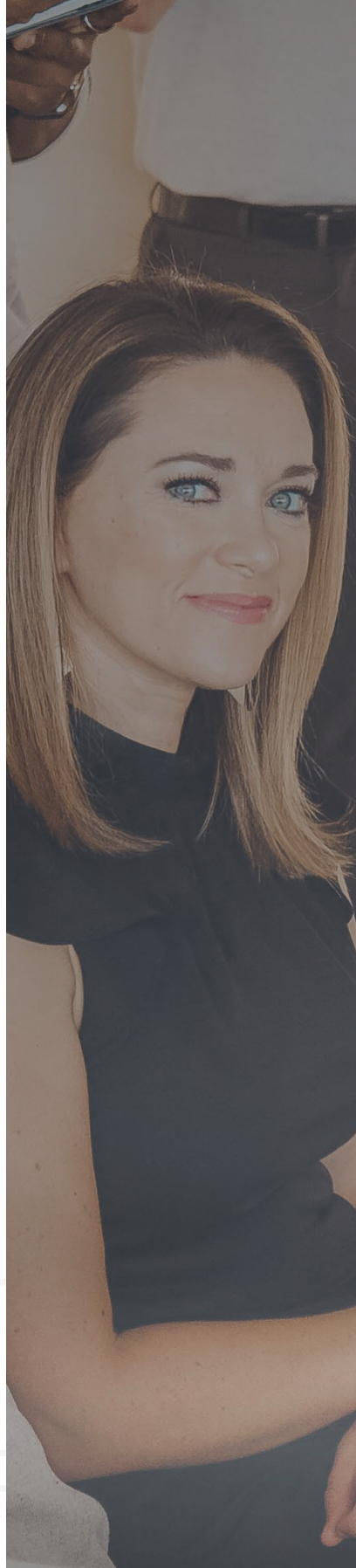
Financial Literacy

Lean management

Operational excellence

Key reporting

Scalable sales, marketing  
and client delivery systems



**“Leadership changes everything. It is the key to ultimate, lasting freedom.”**

- Kelly Roach

# A LOOK INSIDE LEGACY LEADERS...

**Weekly Group Mastermind Call** | Training with our board of senior advisors + Kelly followed by mastermind discussions around growth, systems and processes, implementation, results, and other topics as they arise (every Thursday from 2:30 to 4 pm ET)

**Weekly Biz&Build** | Group coaching sessions with Kelly, followed by master coaching + real-time implementation with our team

*\*available for you or your team members to attend*

**Bi-Monthly BizSync** | Two 50-minute 1:1 consulting sessions each month with your Business Strategist

**Quarterly Strategic Planning Sessions** | Meet with our full strategy team and community once per quarter to get ahead of the game with dedicated planning time  
Monthly Office Hours | Drop in for immediate questions or roadblocks

**24/7 BizBase Portal Access** | Our centralized coaching hub houses session notes and action items, additional on-demand trainings as needed, resources and templates, progress and KPI tracking, easy call bookings, community-building and collaboration, real-time feedback, and more

**24/7 access to our Legacy Leaders curriculum** | On-demand trainings around team productivity and profitability, recruiting, interviewing and hiring, leadership, KPI tracking and more.

**24/7 access to our Empire Builders and Legacy Builders curriculum** | 300+ On-demand trainings for you and a team member, so your team can grow in alignment with you (trainings include, sales, marketing, PR + Visibility, offer development, service delivery, referral generation, budgeting and forecasting, and more).

**3 Annual In-Person Experiences** | Connect with your Legacy Leaders peers in-person for coaching and implementation, high-level discussion and masterminding (twice in South Florida and one immersive retreat at a surprise location each year)

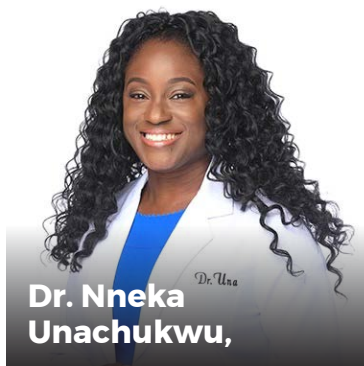
# CASE STUDIES



**Jack & Michelle  
Bosch,**

Co-Creators, Land Profit  
Generator

**Scaled from 7 to 8-figures in  
one year, grew by 65%  
during COVID, purchased 2  
vacation homes, built a team  
of 76 full-time employees,  
Inc. 500 recognition**



**Dr. Nneka  
Unachukwu,**

Founder, EntreMD

**Scaled from \$1M to \$2M in  
year one, Inc. 500  
recognition**



**Allison Williams,**

Owner, Williams Law Group and  
Founder of Law Firm Mentor

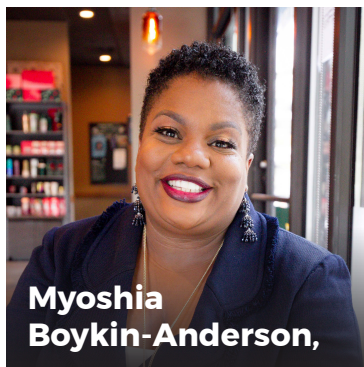
**Scaled from just under  
7-figures to multiple 7-figures**



**John Briggs,**

CEO, Incite Tax

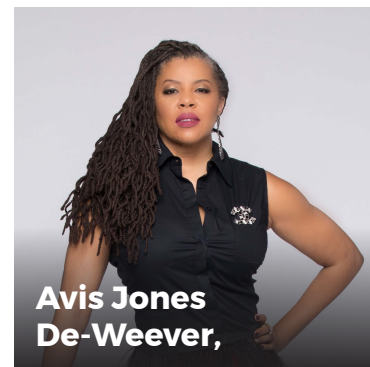
**Doubled team size to 40  
employees, shifted from 5%  
to 80% self-led organization**



**Myoshia  
Boykin-Anderson,**

Founder, AndTech Solutions LLC  
and Beyond Belief

**Launched second company**



**Avis Jones  
De-Weever,**

CEO, Media to Millions

**4Xed business revenue in  
year one and surpassed \$2M  
in 2021, with multiple  
6-figure launches**

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**Angela Tran,**

CEO, MedFit Medical Weight Loss

**Doubled company revenue  
in less than 90 days, and  
doubled again by year one**



**Debra Berndt  
Maldonado,**

CEO and Co-Founder,  
CreativeMind and CreativeMind  
University

**Generated \$270K n sales in  
one month - her highest  
month to date**



**Shelley Riutta,**

Founder, Holistic Business School

**Executed 5 6-figure launches**

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# biz.

## KELLY ROACH

### CEO & FOUNDER

Kelly is a multiple 8-figure entrepreneur, Inc 500 recognized business owner, consultant, and mentor to leaders and visionaries who are building legacies and disrupting their industries. She founded Kelly Roach International while working full-time in Fortune 500 as the youngest senior vice president at her firm, where she was promoted 7 times in 8 years, was responsible for leading teams of over 100 to record-breaking sales, and leading through the economic downturn of 2008 (without a single layoff). She built her business to 7-figures before quitting her corporate job, and now mentors CEOs and professionals around the globe to achieve freedom, financial abundance, and fulfillment in all areas of life.

She is a 4X bestselling author, top rated podcast host of The Kelly Roach Show (with over 2 million downloads), founder of Kelly Roach International, The Business Advisory, Conviction Marketing Agency, The Advance Innovation Society, and Co-Founder of The Courageous Brand. She also founded the Human Family Foundation nonprofit, where she is committed to ongoing philanthropic work (partnering with Charity:Water, SoGal, Black Girls Code, St. Jude Children's Hospital, and more). She has been featured in some of the world's leading publications, including Forbes, Inc, and Business Insider.

# MEET YOUR BOARD OF ADVISORS

We've got your back - leverage our team's expertise when you need it most.



**Krystal Borg**  
President of The Business Advisory

As an entrepreneurial-minded professional, Krystal is an expert at unlocking company sales potential by carefully crafting powerful strategies and building teams of high performers. Throughout her career, Krystal has both owned and managed businesses with revenues ranging from start-up phase (inception) to 7 & 8 figures and, had two successful business exits. Krystal has grown startups to over \$1.5M in revenue within 12 months of inception (doubling that in year 2), raised over \$1.5M in capital for start-ups, turned a company's financial performance from negative \$500K profitability to over \$1.8M profitability in one year, and grew sales from \$4M to \$18M within 5 years, positioning the company as THE leading authority in their industry.



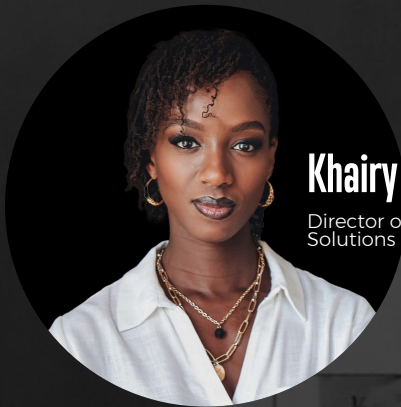
**Ty Richardson**  
VP of Consulting & Business Solutions

After a 14-year career in a fortune 100, over a decade of experience as a serial entrepreneur in tech, marketing, events, finance and coaching, and an academic doctoral career in global business, Ty has amassed a wealth of experience in customer experience design, client-focused retention strategies and employee development. Ty's ability to help businesses plan their customer engagement through retention and renewals, balance employee development and support event experiences gives him a level of expertise to support any business scale in any environment. Ty also excels in the art of networking and community engagement for greater brand awareness, presence and growth.



**Deepak Sharma**  
Vice President of Coaching & Operations

Deepak is a results-driven operations professional with an impeccable performance record and leading businesses to explosive growth, optimizing people, processes, and systems for quality and profitability. Deepak has worked at both small and large businesses, flipping a mid-size business by reducing overall costs by 15% while also improving service and delivery, which ultimately drove that business from losing \$500,000 a year to \$1.8 million in profits.



**Khairy Varre**

Director of Business Solutions

Khairy spent 10+ years helping organizations and high performing teams deliver mega-projects ranging from \$50M to \$6B in scope. In 2018, she started her business helping entrepreneurs achieve their business goals in record time, equipping small and mid-size organizations with the knowledge and tools that large corporations use to conquer markets. She built her consulting business to 6-figures within a few short months before folding it (and her MBA lecturer gig) to join our team as a strategist for 7+ figure entrepreneurs. She's helped businesses start and scale to 6-figures in one year or less, scale from 6-7 figures in one year, and helped 7-figure businesses triple their yearly revenue in one year, creating 60 million dollar businesses - all with very healthy profit margins.



**Kate Jaramillo**

Business Strategist

Kate is a 3X cookbook author, health, mindset, and business coach who loves helping entrepreneurs launch, grow, and scale their online businesses. She wholeheartedly believes in the power of coaching, networking, and personal development for short and long term success. Kate's high energy and background positions her to help our clients gain the mindset they need to fully realize their potential and soar in our programs.



**Heidi Frost**

Program Manager,  
Empire Builders

Heidi specializes in helping clients create sustainable, scalable and predictable profits. After a 19+ year career in occupational therapy, Heidi left the healthcare industry to advance her skillset in coaching and working with business owners and entrepreneurs to scale their impact and income, without sacrificing their health, their time, or their fulfillment. Her accountability and implementation-driven approach to working with our clients have led to incredible results for entrepreneurs across industries.



**Katy Hoagland**

Business Strategist &  
Sales Excellence Coach

Katy built her career in consultative sales, where she discovered a passion for helping entrepreneurs start and grow 7-figure businesses. During her first year in the high-ticket coaching space, she generated \$1M in revenue for a start up, built and led a sales team in year 2, and hit \$10M in sales in year 3. In 2019, she began coaching and consulting high-ticket entrepreneurs and in 2021, joined our team to do this on an even larger scale. Her expertise is coaching service-providers to fine-tune their processes, build people-centered company culture, and work smarter to scale efficiently and effectively. An eternal optimist and natural leader, Katy's passion is watching people mold their businesses in a way that supports the life they've dreamed of, break through the barriers and typical "norms" and find peace and joy as they build their legacy.



# WHY US?

Your business is in good hands.



Inc. 5000 recognized as one of the fastest growing private companies in the US



75+ clients scaled past \$1M in revenue; and 2 clients scaled past \$10M in revenue

## AND, MORE THAN 50 INDUSTRIES SERVED GLOBALLY.

- |                              |   |                      |
|------------------------------|---|----------------------|
| Lawyers                      | Service Based Online Businesses         | Actors And Producers |
| Medical Weight Loss Doctors  | Trade Businesses (Hvac, Plumbing, Etc.) | Influencers          |
| Health Practitioners         | Manufacturing                           | Speakers             |
| Agency Owners                | Accounting And Financial Institutions   | Interior Design      |
| Coaches                      | Publishing                              | Contractors          |
| Consultants                  | Digital Marketing                       | Copywriters          |
| Speech Language Pathologists | Music & Arts                            |                      |

**AND MORE...**

# SALES, MARKETING & OPERATIONS

Gain insights from our experts across departments to take your business even further.



**Derek Mumford |**  
Business Strategist  
& Director of Sales

Derek has 15 years of experience in the entrepreneurial space running, selling and leading companies to multi-million dollar success. He co-owned a global manufacturing company, that he sold for 8-figures in 2021 before joining the Kelly Roach Coaching/Business Advisory Team as a sales leader, where he now works with multi-7 and 8-figure business owners, helping them leverage relationship-centric sales and marketing strategies to exceed their revenue goals.



**Kaylan Wetzel |**  
Business Strategist

After a decade in the acting and arts education world, Kaylan moved to NY for a change of pace and became a founding employee at a beauty and wellness tech startup, where she helped develop the company's talent acquisition strategy, event based marketing, strategic brand and corporate partnerships, and B2B sales. She acquired lucrative partnerships with some of the leading beauty brands in the industry including Dove, Sally Hansen, and Coty Inc., and built a unique B2B Corporate Wellness model with companies such as WeWork, Conde Nast, Salesforce, Metlife, AOL, Spotify, Macy's, Bloomingdales, Facebook, Bumble, and the Hilton Hotel Chain. She was eventually promoted to Director of Business Development, overseeing the launch of the company's London, LA, Chicago, Austin, Atlanta, D.C., and Philadelphia branches, with a team of Business Development Managers in each city. Kaylan brings her wide range of experience in start-ups, sales and marketing, and performance to our clients.

**Elise Halvorson Nguyen |** Community Manager

**Krista Cerminaro |** Marketing Director

**Hannah Bechtolt |** Marketing Assistant & Project Manager

**Sean Foran |** Graphic Designer

**Stacey Doyle |** Community Manager

**Harrison Raznick |** Continuous Improvement Specialist

**Paul Corral |** Paid Traffic Manager

**"I'VE COACHED WITH KELLY AND HER INCREDIBLE TEAM FOR OVER TWO YEARS. SHE IS HANDS DOWN THE BEST MENTOR I HAVE EVER HAD"**

-Heather Alice Shea