



KEEN WEALTH ADVISORS
Perceptive. Personalized. Precise.

CLIENT TESTIMONIAL

As Founder and CEO of Keen Wealth Advisors, I was excited when I initially learned of the opportunity to engage with Joe Ratterman, founder of Waterstone Leadership, to coach and mentor the newly appointed president of our firm.

After serving on the board of directors of Angel Flight Central with Joe for several years, studying his impressive CV, including his accomplishments as the CEO of BATS, and witnessing his commitment to the community and many philanthropic efforts, I jumped at the opportunity.

Shortly after the engagement began, we were already experiencing huge value and I realized that to maximize Joe's effectiveness that I too should be working with him.

Over the course of the first year, we evolved and expanded our vision, crystalized roles, revamped our hiring process and were able to discuss and debate major decisions among many other initiatives. Joe was able to work at a high strategic level but is also willing to get down in the weeds on issues as they arise.

He has the skills and expertise to coach a Founder / CEO along with the acumen to mentor an operating president / COO on issues that in some cases are very different.

There was a nice balance in our work together that included both personal and professional initiatives that made the experience even more unique and effective.

As our initial year-long engagement was wrapping up we determined without hesitation that we wanted to continue working with Joe for another year and were grateful that he agreed to continuing working with us.