

SEASON 6 EPISODE #7

JONATHAN KINGERY

DOUBLELINE

Narrator: Welcome to the Rainmaker Podcast with your host, Gui Costin. The goal of this podcast is to give listeners a unique look into sales strategies from top industry executives. We introduce you to the heads of sales and heads of distribution who will help you understand the inner workings of the successful sales organizations from philosophy to execution. This podcast is essential for sales professionals seeking wisdom from the best in the field. If you're not familiar with Dakota and their Dakota Rainmaker content, please check out dakota.com to learn more about their services.

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Gui Costin: What is up everybody? It's Gui Costin, founder and CEO of Dakota. Welcome to our latest episode of the Rainmaker Podcast. I'm so thrilled to be joined by Jonathan Kingery. Jonathan, welcome.

Jonathan Kingery: Thank you, Gui. Great to be back and be back in my home city of Philadelphia.

Gui Costin: I love it. Mr. Kingery joined DoubleLine in 2025 as a Chief Distribution Officer and is responsible for managing the firm's U.S. relationship management team, which includes institutional, wealth management, sub-advisory, and retirement client business. He's also a member of DoubleLine's executive committee. Prior to DoubleLine, Mr. Kingery was with Franklin Templeton as head of U.S. wealth management, and served on the firm's management committee. He also held the roles of head of private wealth and board member of Fiduciary Trust International during his tenure. Prior to that, he was with Lord Abbett & Co. as head of institutional RIA and family offices with consultant relations team, in addition to time as a regional manager within the global private wealth team. Mr. Kingery holds a Bachelor of Arts in history from the University of Delaware. He's also a CFP professional and an accredited investment fiduciary designee. All right, so let's just go back to the beginning. Where'd you grow up, college, and how did you make your way to where you are today at DoubleLine?

Jonathan Kingery: Uh, grew up in Dover, Delaware. I was the youngest of 3, all bunched together pretty close in age. My, uh, mother was an elementary school teacher. My father was a, uh, public school administrator. Um, oddly, I always say, hey, my, my father was actually my principal from kindergarten through 4th grade.

Gui Costin: Wow.

Jonathan Kingery: I think it'd be an interesting social study or social experiment to say every day is bring your child to work day and to see your parent, your father, your parent, your mother in a leadership position during those years. And that's what I got to do.

Gui Costin: That's pretty awesome.

Jonathan Kingery: That was—it was a great experience. Learned a lot just watching that.

Gui Costin: Yeah.

Jonathan Kingery: So grew up in Dover, Delaware, was a graduate of the University of Delaware. Had a—didn't know what I wanted to do when I was in college. I had a history major and I was in their physical therapy interest program, which was set up to go into graduate school for physical therapy. Got to my senior year and what I encourage anyone to do, go to the employee fairs, you know, the employers that are coming onto campus, which I did that. And I started meeting with investment firms at the same time I was taking I started to take finance classes, introduction to investments during my senior year electives, and it just clicked. This, this is really appealing to me. It's not part of my background. Didn't grow up with it. And then started right out of college, the ripe age of 22, with American Express Financial Advisors. And I spent my 20s as a financial advisor pretty much throughout the whole—

Gui Costin: How has that over time impacted your role in distribution?

Jonathan Kingery: Well, that experience—I'm a believer everything has to start with the client, right? So everything that we do, we have to start with the client, work backwards. And I actually was the client for 7 or 8 years. I didn't know the job, what the job of a, you know, on the wealth management side, lack of a better word, wholesaler was until I was a financial advisor and they started to come in and you see who's good, who's probably a little bit, you know, could use some polishing. You learn from that. So, it certainly shaped a lot because I was on the other side of the desk for 7 years. Yeah. It was a great experience. American Express, now Ameriprise, it was all about financial planning. So, I had my CFP around the age of 25, 26, got that right off the get-go. And you really learn just how to put a plan in place. During that time, then I did go on the independent side, used LPL as back office for a couple years. And this is at a time, this is 10 years before LPL went public. They had less than 1,000 reps at the time. Right. So, I've seen that change quite a bit. But it was a wonderful experience. It was always, I always looked back to the representatives from the asset managers coming in and having the business-to-business business conversation.

Gui Costin: Yeah.

Jonathan Kingery: And that's what I got thirsty for. That was the part where just that business-to-business relationship. So at the age of 30, I made the move to asset management and I started off with a great firm, Lord Abbett.

Gui Costin: Yeah, incredible firm.

Jonathan Kingery: Yep. 14—look, just over 14 years there. And I was covering—I mentioned my home city here growing up in Delaware. I was covering Baltimore and Philadelphia. So just, I love driving in today.

Gui Costin: Yeah.

Jonathan Kingery: The advice—financial advisors I called on during those years are—they're still my good friends today. And same with the—my buddies from the financial advisor side, 20, 30 years later.

Gui Costin: It's one of the best things about this business that if you get out and build relationships, you're all likely going to have them for 20-plus years, right? People stay in the business.

Jonathan Kingery: I say this, you know, again, my own children, build your network now because it will stick with you, right? Yeah. Still to this day, I mean, literally my, my closest friends, the roots go back to either my time when I was at American Express Financial Advisors or I was calling on financial advisors. Those are the vast majority, and there's some branches off of those, but those are really the roots of my, my friendships today. So, uh, covering Philadelphia and Baltimore on the wealth management side, predominantly the wirehouses, but regional broker-dealers as well. And, you know, Lord Abbett, they took a lumpy piece of coal and they helped form a lot, you know, helped polish, helped make me better. You got to see there what the power of a really strong distribution team, the alpha that they can provide to an organization.

Gui Costin: Yeah.

Jonathan Kingery: And had great mentors from Bob Nolke to Pat Brown and Doug Sieg and Really good experience there. And about 10 years in, I had actually been asked to come into the national accounts team, and I had declined it. And I went back to my advisors and said, you're stuck with me. I'm here. I said no, and I'm here. And I think the best compliment I received at Lord Abbett was they came back to me a second time and they asked me to build out the RIA team. And this is in 2014. And you just saw where the, you know, the momentum that that area had and to be able to build it. And that was an experience because that was why I say building a business from a desk of one.

Gui Costin: Wow.

Jonathan Kingery: And we talk about player, coach. I felt, you know, it was a bit of a player, coach, general manager. I'm calling on RIAs, I'm hiring and building the team, and I'm walking into the CEO once, once a quarter giving the business update. And you learn so much through that.

Gui Costin: Yeah.

Jonathan Kingery: You just, you learn how to prioritize your time.

Gui Costin: Yeah. What to you would be the biggest takeaway that you learned just from being that one man? And then what do you apply to it?

Jonathan Kingery: Time management more than anything, prioritization. I mean, you just, you have to be adaptable and you have to be able to go from the client lens to, okay, now we've got to really make sure the team's humming along to how's the business running. So that's why I say like player, player, Coach, general manager, different skill sets. So again, adaptability, but really how do you prioritize your time?

Gui Costin: Right.

Jonathan Kingery: So it was a great experience. And then 2019, I had an opportunity to go to another fantastic firm, Franklin Templeton, and they had a very small RIA team in place, but they had one in place and they wanted to build it out. So I say small, 4, there were 4

external wholesalers, 4 internals. I just was talking to a friend over there. They're up to 18 territories now.

Gui Costin: Wow.

Jonathan Kingery: So that 2019 to now. So explosive growth. And again, great mentors from Bob Geppner and Dan O'Leary to Jeff Mason and Adam Spector, Ginny Johnson, just great people to learn from. And it was an amazing experience because in that period of time from 2019 until last year, In fact, I'll look back. I was there one year. So 2019, I get to 2020, we announce a new CEO. Greg Johnson hands over the reins to Jenny Johnson. We announced the acquisition of Legg Mason and COVID hit all in a month.

Gui Costin: Wow.

Jonathan Kingery: So going through the Legg Mason acquisition and just, again, a great experience because I got to see under the hood of so many different asset managers. while just being at one place. Yeah. I got to see Western Asset, I got to see Brandywine, I got to see Royce, you could see ClearBridge, you could see how all these different organizations operate without having to work at all these different organizations. And through that acquisition, my responsibilities widened. I was asked to take over what we termed Head of Private Wealth, which was the RIA bank trust team. We had an institutional warehouse team, had a national account segment to it. Internals, it was about 35, 40 people and great experience. I mean, that was a—again, getting an opportunity. I love to build teams. That's what I love to do.

Gui Costin: Well, that's what you told me before we started. You ended up having 270 people underneath you at Franklin Templeton. Then you go to DoubleLine, you know, last year. Now you're starting with 20.

Jonathan Kingery: Yes.

Gui Costin: So talk to me about the differential in that.

Jonathan Kingery: That changed. Right after Legg Mason, Franklin Templeton acquired Putnam. And at that point, I was asked to be head of US Wealth Management. And that was overseeing all of the field and all the internal desk. And that was about a team of about 270, a large group. Again, great organization, was—had planned, you know. Right. Wasn't planning on making any changes. And I will say, sometimes the universe just talks to you and you have to listen. And an opportunity presented itself to me And I remember when I was on the phone with the individual and I said, I'm happy here. I'm not looking to make a change. And he said, well, if you were, what would it be about? I always thought it'd be fun to run what I would call a SEAL Team 6, a smaller team of just the best of the best, highly skilled, highly talented group. You get to interact closer with them and Let's just see how we can do with that very nimble, agile unit. And the individual said, well, Jonathan, that's what this kind of is. And once I found out, it wasn't even where it was DoubleLine at the time. Once I found out it was DoubleLine, I just went, oh, to me it was a unicorn opportunity.

Gui Costin: Yeah.

Jonathan Kingery: To be able to come to DoubleLine, that is what I would say, iconic name, especially within fixed income, legendary. legendary investor in Jeffrey Gundlach. But it goes beyond Jeffrey Gundlach. It goes to the investment teams and everything that's been

built around there. Truly an investment-led organization that wanted to make their number one priority building distribution out.

Gui Costin: Gotcha.

Jonathan Kingery: And I just didn't think I was going to see this again. I just didn't. So, came in. It's actually today is my first day of my second year. Yesterday was my one-year anniversary. And so, in the last year, we've essentially doubled the size of the distribution team from roughly 20, 25 upwards, just north of 40, going on 45. We should see about a double this year. There's still work to go.

Gui Costin: Wow. And so, when you look at that team now, I know we talked about it in the opening offline sales process, right? So, now you have both institutional and wealth, right? And maybe we won't talk specifically about each sales process because they can be slightly different.

Jonathan Kingery: Yes.

Gui Costin: But just talk to the importance that you feel that as a salesperson, because we're talking to an individual salesperson, a boutique asset manager, they might not have any leadership, how important a process is.

Jonathan Kingery: Anyone that's worked with me knows how process-oriented I am. And I often say, if you do not choose your own habits, your habits are going to choose you. And that's essentially what you're creating with the sales process. You're taking the thinking out of the day in, day out. You already have the process in place, the habits in place that frees up your thinking for the creative side when you're on the spot. So, I go back to, again, American Express. We were on the side, like we had a process, you had the acronym along the side to make sure the meeting flowed the way you wanted it to flow. Lord Abbett was the same thing, and we still use that to a degree on the wealth management side. It was called RALA. Relationship, application, leverage, appointment on appointment. You knew in a meeting that that is the process you had to run through. When we got to Franklin Templeton and I laid out 3 different processes, I went, I don't care which one you pick, you just have to have one.

Gui Costin: Right.

Jonathan Kingery: That's the key. I—any organization, you want as much of a uniform process across the organization as possible. But the main thing is you have to have a process. You can't go to every meeting and just wing it. Yeah. Can you imagine going to a doctor and the doctor treats you differently than the next? I'm going to try this one the next meeting. Like, right. You have to have those habits. You have to have a routine.

Gui Costin: I think what, you know, what I'm hearing is—and we always talk—I always talk about focus on what matters most. That's our umbrella concept at Dakota. But then you start with the end in mind, you work backwards. So what are the key things that matter the most? And anyone can hopefully figure that out, right? If you focus on things that matter most, which ends up becoming your process. Right. And if you always have that focus matters most, focus on what you can control now.

Jonathan Kingery: Make the main thing the main thing. Yeah. We're working on our strategies planning for next year right now. We're actually—our leadership team, our direct

report group is going to get together next week to go through them. And I'm looking at the plans as we're working through it and I'm going, don't bury the headline. Don't bury—whatever's most important, let's put that up top and then work from there.

Gui Costin: Yeah.

Jonathan Kingery: So yeah, absolutely have to make the most important thing.

Gui Costin: And one big component of a sales process is a CRM, right? It's the ultimate leverage point, in my opinion, for a salesperson, simply because time flies if you're setting up a ton of meetings and you don't have the basics entered. So could you talk to us, in your opinion, the importance of a CRM to you and how you run the business?

Jonathan Kingery: CRM is funny because CRM is 3 letters, but salespeople tend to—or relationship managers tend to look at it as a 4-letter word. Always has been. It's one of these like dreaded things. And it's funny when you think back 20 years ago, what a CRM looked like. And you think you're—

Gui Costin: I mean, sometimes I think you're torturing people. It's like, dude, just get the meetings you scheduled in the thing so you can track past activity and get your call notes in. And now using Claude, you can do call notes.

Jonathan Kingery: So think about how much better CRMs are today and how much more easy they are today. Oh, incredible. And you can utilize technology to just call and leave it into a voice system. And yet we still, we get angst around it. Client-facing professionals want to be in front of clients and the things that they're behind the laptop or the desktop, it's expense reports, it's scheduling, it's CRM to degrees. That's where they'll feel a little bit of, you know, I want to be in front of the client. But that means it's the central nervous system. It is the central nervous system to the client business. It's the brains, it's the spine. It's going to hold all, memorialize. It's the library of the client information. And then it kicks out information to the organization. It allows the person before they go in front of the client to make good decisions. It truly is the chassis that the client business has to run off of.

Gui Costin: Yeah.

Jonathan Kingery: I think it's important on how you as a leader, how you prioritize your decisions and how you prioritize what you need to focus on. And we talk a lot about mission, team, individual. That's how I factor my decisions. Is it good for the mission? Our mission is to deliver superior risk-adjusted returns and a best-in-class client experience. So I'm responsible for that latter part. Is it good for the mission? Is it good for the team? And then is it good for the individual? You talk about—I've heard you say if you're a one-person, you know, Gui Costin Inc., how do you run it? For that person, you run through the same filter. Is a CRM create leverage? Is it good for them at the mission level, running their territory, running their business? Is it good for the team, all the leverage points in the organization that they're leaning on? And is it good for them to be able to drive revenue and drive satisfaction with clients?

Gui Costin: Yeah.

Jonathan Kingery: I'd say yes, yes, yes.

Gui Costin: totally, totally. And that with all the tech tools now that are available, uh, you know, basically all the LLMs, the things that you can do with Slack if you just get the data in, it's amazing what the intelligence it can give to you, right? It's just—and we've always been ardent Slack Slackers, if you will, because that—but then we just programmed to go right into Salesforce. So we don't even have to enter into Salesforce, we enter in Slack and it goes right in.

Jonathan Kingery: We utilize technology called Hey Dan. Goes right in.

Gui Costin: Right.

Jonathan Kingery: Just come out, leave, leave a voice message and it goes right in. There's so much—you can't go anywhere without talking about AI right now. And it's just at a conference last week and it was all around AI. But AI is only going to be as good as the data it's built upon.

Gui Costin: Totally.

Jonathan Kingery: If you don't have good data, then the AI is going to be useless.

Gui Costin: Yeah.

Jonathan Kingery: And the good data resides in CRM.

Gui Costin: Right. And we're, you know, we're in the data business, obviously. What I always find fascinating is a lot of people ask me, how do you capture your data? I'm like, that's, that's a—that's not the right question to ask, right? Because it's the easiest thing in the world because everything that we do is roughly publicly available, right? It's—we absolutely can—everyone has access to publicly available information. Can you then organize it? But most importantly, do you have a team? We have 18 people. dedicated to updating? That's the question, right? Is that because if your data is not up to date, and it's not fresh, then the AI, you know, it can confidently fail, right?

Jonathan Kingery: Garbage in, garbage out.

Gui Costin: Right. So, and that's what I don't think people really understand is that, yeah, it's one thing to scrape, you know, we don't scrape, but it's like RIAs or family offices and all of this stuff. But one of the biggest problems of acquiring data, right, is then organizing it and having a mechanism to keep it up to date, right? Because there's so much turnover in our business, roughly 20% to 25%. Right. This is just crazy. I mean, you know, if you do 350,000 financial advisors and 23,000 FA teams and you're looking at 20% movement, I mean, those are 60,000 a year. That's a lot of—that's a lot to update.

Jonathan Kingery: It's a lot.

Gui Costin: You know what I mean? It's a lot for an organization.

Jonathan Kingery: Yes.

Gui Costin: Right. To keep up to date. And I also think what you were talking about, getting that information in the CRM is the richest data. And now the fact that you can go ask Dan or you can just go to Claude and say, hey, I just had a meeting with Jonathan Kingery, this is what we talked about. talked about. These were the follow-ups. Can you write me clean call

notes? And it's connected to your calendar, so it has everybody listed out. That's within 2 minutes in the lobby. So there's no excuses unless you're going to tell me you don't know how to talk. You can't not get call notes in, right?

Jonathan Kingery: As I say, it's the central nervous system. It is the chassis that the client business is built upon. And as I go through it, I'll go back to that mission, team, individual. The mission—mission's really the client. Is it good for the client? Yes.

Gui Costin: Yeah.

Jonathan Kingery: Is it good for the organization? Yes. Is it good for the individual? Yeah,

Gui Costin: totally.

Jonathan Kingery: Yes.

Gui Costin: And so as we move on, it's just—I want to get at the leadership. So how would you characterize your leadership style? Because clearly you've got an intense warmth about you, right? And you have process-driven, which is critical. But how would you personally describe your leadership style?

Jonathan Kingery: As I mentioned, I've been fortunate to, to build and be a part of, say, 5 teams now. And the best if you've ever had this experience, I'm sure you have. The best teams, the best environment is when everyone's bought in, everyone's bought in, and then they hold each other accountable. Right. The locker room is holding each other accountable. That's when it—I mean, that's when you're having fun.

Gui Costin: Yeah.

Jonathan Kingery: That's when you win. So my leadership style, number one, is get the right team in place. Right. Talent. When we're going through the acquisitions I spoke of before, it's talent first, structure second. If you get talent right and structure 85% right, then you can always fix that in year 2 other 15%. But get the right people in place. One of the things I really strive for as a leader is to find in each individual—and we have all done our assessments on who we are—and one thing that always pulls out for me is that I See the individuals for who they are, and I aim to maximize their strength. So that's why I kind of like the idea of a SEAL Team 6, where I get to know everyone and find out what their strength is, put them in that right position, build that team. Once the team's in place, it's the leader's job to set the environment.

Gui Costin: Love that.

Jonathan Kingery: I had a former mentor always said it's the leader's job to control the temperature of the room. Right. So set the environment, set the expectations of what the team is. Be clear about that. Communicate it over and over. But really, that's how I'd look at it as far as my style.

Gui Costin: Yeah, and I love that. I also think that energy, right, like as a leader, the people are going to feed off of your energy, right? They're also going to feed off how you treat them. And as I said to you earlier, in my opinion, the most under-talked-about thing in leadership and growing a business is using culture how you treat people. That's really what culture is. How do you treat people as a competitive advantage? And I wrote the book Be Kind

naturally because I wanted to show you can have a super high-performing culture but do it with kindness. We've proven that it works. Now, it takes ridiculous vulnerability on behalf of the leader, right, to be kind. And you just can't say it when it comes into your mouth and into your brain, right? And a lot of leaders—

Jonathan Kingery: You can't throw away words.

Gui Costin: Right. You have to be so delicate. But then what that translates into, the magic, is where the leader keeps the best people forever. Yeah. Right. That should be the goal. Keep your best people forever. And in order to do that, you work backwards. You got to be cool. I mean, you got to be cool with that. Now, that doesn't mean we're going to not be playing at the highest professional level. That's not going to mean that we're going to tolerate incompetence or, you know, not professionalism, however you want to say it. Right. I'm not saying we're sacrificing anything, but then all of a sudden you do it and it's unreal what you can accomplish. And that, that kind of leads me into my next question. You've worked with so many young people, you've mentored so many young people. What, what advice would you give a young person getting in the investment sales business today?

Jonathan Kingery: You know, I want to build on what you just said before I go into advice to a young person. So we were talking about that locker room, and I'd say iron sharpens iron. Keep your best people. Right. So when the environment is iron is sharpening iron and everyone is there and they—again, where you're holding each other accountable, that means you care for one another. And so when you talk about culture, The root meaning of the word culture is the word care. Right. And I think that sometimes we hear that word and it's going to be kind or care, and it's almost a soft connotation. It means that you're passionate, means that you're invested, you're committed. And it's important to have—say, the lowest standard you're willing to accept will define your culture. You set standards, behaviors, that everyone agrees upon and you hold accountability around that.

Gui Costin: Yeah.

Jonathan Kingery: That's when you feel people care. Take a high performer and let them watch you lead someone who doesn't give an effort and you don't do anything with them. You're not leading them. That takes that top performer down, right? So you need to set the environment, you set the tone, you hold each other accountable, you care for one another. I think that that's spot on.

Gui Costin: The iron sharpens iron. I couldn't agree more. Lions running with lions. Right.

Jonathan Kingery: Sorry, I just wanted to—

Gui Costin: Yeah, no, I'm glad. I'm glad you did because you really brought out, I think, one of the most important words in business, which is standards. That was what you really highlighted. And you have to be very vocal about what you stand for.

Jonathan Kingery: What are you willing to accept and what are you not willing to accept?

Gui Costin: I love that.

Jonathan Kingery: So advice for young professionals. This is a, this is a pretty complex question because, you know, you and I have some good experience, seasoned veterans. So you take this and you try to distill and then you go back to say, what would, what would I say

to either my younger self or someone coming into the business? So I might want to riff on this a little bit and go through a couple of layers. First, I want to say I had the pleasure of meeting with 2 individuals that we just extended offers to. yesterday for our internal desk, and they're both early in their career. And I, as soon as I hung up the phone with one, I was on the phone with our president, Ron Redell, and I was grinning ear to ear. And I said to Ron, like, it's just the energy, the excitement, this—they're a sponge, they want to learn. Can't take that for granted. So anyone coming into the industry, like, hold on to that as long as you can. You talked about energy being contagious and I just love when I meet with people coming into the industry. The advice I would give—I'm going to try and start with what I think is a very practical thing. I would ask the individuals to grab a pen, grab a sheet of paper, and I want—I would ask them to write down because I do think there's a connection from the hand to the brain.

Gui Costin: Yeah.

Jonathan Kingery: And I want them to write down 2 different things coming into the business. Number one, I want you to write out your goals. Statistically, you have more than a 40%, 40 to 50% chance of achieving your goal simply by writing it down.

Gui Costin: I love that.

Jonathan Kingery: I don't know what it is. And this is something I was taught early in my career. And I started writing my goals down when, you know, I do it every single year. What's even more amazing, if you're willing to share your goals with someone, another person, it almost doubles the likelihood that you achieve it. So for anyone young coming in the industry, again, write it down. If you want to type it, put it in the computer, you can always go back to it, but initially write it down. So write that down. The other thing I would really encourage them to write down, it may seem a little out of reach if you're new to the industry, but write down your principles. Write them down today as you're coming into the business. You talked about be kind, right? Yeah. Be a good person. What matters to you? What are the things that really are going to guide you that you think really matter in life, that are important to you. Write those down. And I would ask the individual, keep that nearby. Once a year, look at it. It becomes a living document. We go through hardships. There's no way—you will go through hardships.

Gui Costin: Right.

Jonathan Kingery: Your perspective is a great gift. Your perspective will shift. There are going to be principles that you never realize until you observe them in someone else. You go through something and you'll add to that document. Some things you'll take off. But to me, that was always a North Star when decisions, hard decisions have to be made. Opportunities come up. You're not sure what to do. You're living in ambiguity. Go back to that document. So write your goals down, write your principles down. That's what I would say in a very practical sense of advice I would give. There's a couple other things I wouldn't mind going through, but—

Gui Costin: Yeah. No, I love it. And I just want to make a comment on that. So, you know, we call them core principles, Decodisms. I always encourage people. It's, again, a very under—people talk about it, but it's like leadership trust and all that. You really have to put it in words that are meaningful to the company and your organization. So we call them Decodisms. They're just different lines that I've come up with over time.

Jonathan Kingery: They're mantras.

Gui Costin: Right. They're mantras. Right. And we actually had our graphic designer do a whole design up in our 4th floor office where you walk down the hallway and they're on both sides of the hallway filled. And so it's just a constant reminder. It's really why I was just—a guy just asked me some advice for writing a book. And I said, the first thing you should do if you want to write a book, write down, right, what do you think you'd want to share with the world? You've been in business for 30 years. What do you want to share? Right. It turned out, subconsciously, by me writing the 2 books, The Dakota Way and Be Kind, it's forced us to basically stick to that mantra. Right. Because I wrote the book on it. I have to follow it.

Jonathan Kingery: It does. It's a North Star. And that's where I go. Because again, you will get hit on the chin. You're going to have periods where you're—you feel like, is my career going in the right way? Because it doesn't happen overnight. This is—there's no destiny. All of the clichés, it's not a destination. It is the journey. And you're always on that journey. You need that North Star along the journey. So I actually still have—still on the letterhead from when I was 29, the things that mattered to me. And I go back to them and I've built upon it. Yeah. And I work through and I go back and it's surprising to see how much it still resonates. But that's what I've leaned on in those moments where you're not sure what to do. So again, I just say you're going to find out if you're 22 coming into the industry and when you're 52, you're going to look back. The core of what you wrote down, the core, it's going to change, but the core is still going to be there. And it's a great North Star and your goals are going to change constantly. So that's something you're doing either quarterly, semiannual, annual and share them.

Gui Costin: World class. All right. Final question. There's a lot going on in the world, right? What is one of the biggest challenges you're facing right now and how are you overcoming it?

Jonathan Kingery: The biggest challenges, it's always for these roles, it's always prioritization.

Gui Costin: You know, remember, you've said this quite a bit just in our 30-minute time together, which I love.

Jonathan Kingery: So I'm going to show you what my number one priority is and where it is. But it always comes back to to that. Someone else's priority might be their number one priority, but for the, the greater majority, it may not be the main priority. So you have to put those priorities. Right now, our priority and our—I would say, well, it's a bit of a challenge, but it's building that SEAL Team 6. Yeah. You are—I was just speaking to our national sales manager on the car ride in, and we're—you're always—the job, you are always recruiting, you're building a network. constantly, as we talked about earlier. And to get the best of the best, we are hiring, we are growing, we're building a desk, internal desk in Tampa, Florida. We have major market territories that we're, we're hiring. And it's—you've got to be really deliberate. I talked about, you asked my leadership style, getting the right people on the bus. Everyone's eyes wide open. They know what we're building. They know what it's going to take. They're excited about it. That for us right now, that's what we're really focused on. That's the challenge.

Gui Costin: Well, the thing that I love about that, because I've learned the lesson the hard way, is hiring wrong, hiring too fast is so painful for everybody.

Jonathan Kingery: Yes.

Gui Costin: It's so painful. Everybody loses, you know what I mean? Right. And then all of a sudden you start to get your sea legs and your, and your flow, and then you start to know really what good looks like. And, you know, we all go through leadership challenges, childhood trauma, whatever it is, we all have it, right? Because you grew up with parents, right? Whatever. Despite the best intentions, Whatever it might be, right? And you bring that to your leadership style. The one big takeaway I would have for you, which I'm so impressed by, is you're so intensely introspective, right? You're so—and I think that's one of the greatest skills to think about your thinking, right? And it's—and then thinking about your thinking, what you're thinking. That skill is—not everyone has that, right? Not everyone has that. And that's so critical, I think, to leadership is being able to be introspective of your behavior, right?

Jonathan Kingery: Self-awareness. Well, so this last time we met, leadership begins with self-awareness and vulnerability, which you just said as well. And there was another role model. Oh, you know, that's another thing. Find role models because that's what you're going to model your role after. Right. That's who had said he was CEO of Fiduciary Trust and said, I split my time 4 ways and I actually color code my calendar. Gotten away from it. So I've got to get back to this. Client time, team time, strategic partners, other partners within the organization, and then thought leadership. And that 4th one is the one that always gets squeezed out. But that time of just the introspection, looking out further at the business, the trends in the industry, thinking about the team, it's something you literally have to schedule.

Gui Costin: We were just talking about this today. So, you know, the quadrant of important and urgent, all that. Yes. Obviously, we all know that, right? Well, we're always going to do the important and the urgent. Okay. Like, that's, that's how that—that's like living and breathing, right? Getting up in the morning and the whole thing. However, the important but not urgent is where the gold is, right? And that, and that's because it's—you're going to be able to do things if you don't do those things, you know what I mean? But that's where the growth is. And I was just talking about, you know, this exact thing. And that's what, that's what you're getting at, right? If you're, if you're thinking about your thinking, if you can read the room, another thing to set a different different way, being able to read the room. Again, the single greatest business skill on the planet, right? If you can read the room, right?

Jonathan Kingery: It's old Stephen Covey, 7 Habits. That was almost one of the things I said as far as recommending. I said, write down, plan your week. That's another Stephen Covey, right? Plan the week.

Gui Costin: Yeah.

Jonathan Kingery: Focus on what's important. Not the day, but the week.

Gui Costin: Yeah.

Jonathan Kingery: Be deliberate about your time.

Gui Costin: All right, dude, this has been pure gold. I'm telling you, like the way that you look at the world and what you've been able to share today, Right. I mean, this could be a to-do list of things to follow if you want to run and lead a team.

Jonathan Kingery: I enjoyed the conversation. I like to talk about thought-provoking. You ask good questions.

Gui Costin: Good. All right, Jonathan, thank you so much for being on. I really appreciate it. All right, everyone, that's another spectacular wrap of another Rainmaker podcast. Thanks for joining and can't wait to see you on the next Rainmaker podcast.

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