

"Remember you are no better, no worse than anyone else. Your life is one of service"
- Valencia Adams,
chief diversity officer, BellSouth



Mom's CEO Shoes Hard to Fill But the daughter is succeeding on her own.

By Leigh Henderson

Entering their office each day, the mother-daughter team of Candace G. (Candi) and Sarah Kaplan pass framed letters from people like President Bill Clinton and U.S. Sen. Paul Sarbanes thanking Candi for her services.

Twenty-six years ago Candi started a business delivering financial services in Bethesda, Md.; two years later she delivered her daughter Sarah. Today, both Candi and Sarah are financial professionals for AXA Advisors LLC and, doing business as Kaplan Financial Group, manage more than \$100 million in client assets.

Candi has received company and industry awards in each year of her career. In 1993 she received the "Man of the Year" award from the financial services firm MONY (acquired by AXA Financial, part of the global AXA Group, in 2004), becoming only the second woman to win the award since its initiation in 1947. Candi's winning of the award prompted MONY to re-evaluate the name of the award, and in 1998 it was changed to the Jacob W. Shoul Award after the person who originally conceived it.

The Kaplans talked to PINK about their shared success.

PINK: Sarah, what is it like to be tapped as the next CEO and president of the Kaplan Financial Group?

SK: A woman came up to me after a professional meeting and told me, "Your mother is fantastic. You'll never be able to fill her shoes." Frankly, I told her, I'm not going to try. I'm going to be myself to build the best company and have the best family life I can.

PINK: Is it daunting to think you'll be running the company where you used to stuff envelopes when you were 6?

SK: I know it will be a challenge, basically because nobody does it better than my mom. Her energy level is incredible and intense. But I'm certainly up for it.

PINK: Did watching your mom at work make you want to be a successful businesswoman?

SK: Mom was a good model for me. She worked full time, yet she came to my soccer games and always brought a cake to school for my birthday. Because of her example, I never considered not having a career.

PINK: What is the biggest challenge that results from having your mom as your mentor and manager?

SK: The positive thing is that we are both so open and honest. That also can be a disadvantage. If I come in late to the office, she knows exactly where I was the night before. Also, my mom knows what I'm capable of doing, and if she observes that I'm not doing all I can, she reminds me.

PINK: What is your advice to other career-focused women?

SK: Find your passion. You have your best chance for success if you're passionate about what you are doing. Also, take the time to figure out what you don't want to do. Try something, and if it doesn't work, try something else. Keep on trying until you find a way to use your passion.

PINK: Candi, when did you first spot Sarah's potential?

CK: When Sarah was 2, she acted like she was 25. She was always in charge of the relationships, and that's a very, very valuable skill in our business.

PINK: What's the best advice you ever gave your daughter?

CK: Do the right thing, even if you don't know what that is exactly. Do what is best for the client. Believe in what you are doing.

PINK: Sarah, what's the best advice you ever got from your mom?

SK: The same. Do the right thing – in business and your personal life. If you do the right thing for a client, what goes around comes around.

Leigh Henderson's Leadership Training Room is a management consulting and leadership coaching firm (www.leadershiptrainingroom.com)