

Fran Skinner, CFA, CPA Speaker Profile

2024


Keynote, workshop and breakout session speaker for the financial services industry

- Frequent presenter at CFA Institute and local CFA Society events
- Presenter for organizations such as Barron's, Morgan Stanley, KPMG, Equilar, Corporate Board Member, and Bob Veres' Insiders Forum for Investment Advisors
- Upon request, designs custom presentations and workshops targeting your event's objectives and audience

Fran Skinner Partner, **AUMPartners, LLC**

- Independent director on the corporate board of Peoples Bank (PEBO) and Fenimore Asset Management, an independently owned investment firm. Previously, an independent director on the corporate board of Diamond Hill Investments, a publicly traded investment firm. Chair, Compensation Committee. Financial Expert Member, Audit Committee. Member, Nom/Gov Committee (2010 – 2018)
- Contributor, Barron's Magazine (2016 – 2021)
- Board member, Women Investment Professionals of Chicago (4/20 – 4/23)
- Co-author, *High Performing Investment Teams* (Wiley, 2006)
- Trains and presents to all levels and functions of financial services organizations
- More than 30 years in leadership roles and consulting for RIAs, mutual fund organizations, global multi-product investment firms, pension funds, banks, insurance companies, family offices, and specialty boutiques.
- MBA, Finance and Marketing, University of Illinois - Chicago
- Chartered Financial Analyst (CFA); Certified Public Accountant (CPA)

Most requested presentation topics:

- Finding Your Next A-Player: Hiring for "Add and Fit"
- Career Advocates: How to Be One, How to Find One
- High Performing Team Behaviors / Leading A-Game Teams
- Giving and Receiving Actionable Performance Feedback
- Fair Pay and Total Rewards for Your High Performers
- Delegation: Professional Velcro that may be holding you back
- Mastering Meetings that get results...not just more meetings

Presentations can be customized for Women's events

AUMPARTNERS works with investment advisors and asset management firms to develop leaders at **every** level of their organizations - from the executive team, through middle management and individual contributors - utilizing assessments and training customized for your team.

Presentation Feedback:

"Fran – Thank YOU - your presentation was exactly what the audience and our team was looking for - homerun!"

Alison Rooney

Former Content Development Manager, Barron's

"Fran made a huge difference in our company and my leadership. She presents in a clear and articulate manner with actionable content and great presentation materials. She has a very unique skill set of understanding the investment management business but also understanding how culture, teamwork, strategy and communication can transform a company. I highly recommend Fran and will use her again in the future."

Eric Bennett

Former CEO, Tolleson Wealth Management

Highlight on Next Gen:

Fran's most popular presentation over the last few years has been **"Career Advocates – How to Be One, How to Find One"**. This interactive, 60-minute session resonates with all roles and experience levels. It can also be customized for women's events, highlighting how important Advocates are to attracting, developing and retaining women in the Investment Industry.

To learn more or view samples, visit Fran's Speakerhub page at
<https://speakerhub.com/speaker/fran-skinner>