

Fran Skinner, CFA, CPA Speaker Profile

2020


Keynote, workshop and breakout session speaker for financial services industry

- Presenter at CFA Institute and local CFA Society events
- Regular presenter at Barron's Top Advisor Forums
- Presenter for financial services organizations such as Morgan Stanley complex event, Bob Veres' Insiders Forum, and SEI Executive Conference
- Upon request, designs custom presentations and workshops targeting your event objectives and audience

Fran Skinner

Partner, **AUMPartners, LLC**

- Independent director on the corporate board of Fenimore Asset Management, an independently owned investment firm (2019 – present). 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 – present)
- Co-author, *High Performing Investment Teams* (Wiley, 2006)
- Trains and presents to all levels and functions of financial services organizations
- More than 25 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 around the world.
- MBA, Finance and Marketing, University of Illinois - Chicago
- Chartered Financial Analyst (CFA); Certified Public Accountant (CPA)

Most requested presentation and team training topics:

- Finding Your Next A-Player: Hiring for Cultural and Job 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
- Presentation Training for large and small audiences
- Mastering Meetings that get results...and not just more meetings

AUMPARTNERS works with financial services organizations around the world to develop leaders at **every** level of their organizations - from the executive team, through middle management and individual contributors.

Our services include firm-wide, team and individual talent assessments focused on leadership, culture, engagement, communication, job fit (incumbents and job candidates) and succession planning. Based on these assessment results, we design custom training and consulting programs to achieve your objectives.

Presentation Feedback:

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

Alison Rooney

Content Development Manager, Barron's

"On behalf of the CFA Institute, thank you very much for helping to make the Wealth Management conference a success. The audience thoroughly enjoyed your presentation and we look forward to working with you again."

Charles C. Henneman, CFA

Head, Educational Events and Programs

Highlight on Diversity and Inclusion:

Fran's most popular presentation over the last 12-months 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 is also customized for "Diversity and Inclusion" events, highlighting how important Advocates are to attracting and retaining Diverse Talent in the Investment Industry.

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