



Michael Conn
Instructor
Subject Matter Expert



About Michael

Michael Conn is a Financial Services professional with over 30 years experience, 15 years at the executive leadership level. He is accomplished in practice management, organizational training, recruiting, sales management and client services. He successfully ran large national and regional sales forces.

Conn's latest assignment was as Managing Director of TIAA-CREF where he directed the national sales and service force of the Wealth Management Group with 55 locations in 32 states. Under his leadership, assets under management increased by a record 40%, on a year over year basis and advisor productivity rose by 58%. Both accomplishments were best in the company.

In 2002 Michael joined Bank of America where he served as the Regional President of the Private Bank West. He was responsible for the 34 offices in California, Arizona, Nevada, Oregon, Washington and Idaho. The Private Bank is focused on building and preserving the wealth of individuals and families through a wide range of financial services including investment management, fiduciary and comprehensive credit expertise. Conn set a firm record in the Private Bank division as he added 20 seasoned bankers and grew assets under management by \$200 million.

Conn served as Director of the Northern California Region of Morgan Stanley/Dean Witter during his 22 years at the firm. In that capacity, he oversaw the business of 1500 financial advisors in 44 locations in Northern California and Alaska. His region achieved a firm leading 20% profit margin bringing in net income of over \$80 million annually.

Primary Areas of Expertise

- Sales Leadership
- Consultative Sales Practices
- Relationship Selling Skills
- Sales Strategy
- Practice Management
- Leadership Development
- Coaching
- Recruiting and Retention
- Product Development
- Product Marketing

Education

B.S. in Business Administration, Georgetown University

Cannon Schools & Courses

- Sales and Practice Management (CWS® I)
- Client Interaction Skills (CWS® II)
- Keynote Speaker Series on Leadership