

AUTHENTIC LEADERSHIP



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How to thrive as a female leader in wealth and finance



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THE PIMFA AUTHENTIC LEADERSHIP PROGRAMME



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Many programme testimonials



40+ alumni



The programme is supported by CISI



Endorsed by The Institute of Leadership

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OVERVIEW

Whichever way you look at it, the statistics around women holding leadership roles in financial services are not very good. Women attempting to progress into senior leadership positions in the financial sector have always known this. However, the FCA only recently flagged this, calling for an end to the 'senior jobs just for the boys' mantra. Leaders of financial services firms are also now taking notice of the mounting evidence that show that firms with gender diversity among the top ranks enjoy significantly better financial performance than others.

While awareness about the disparity between men and women is progressing, the speed at which

women in wealth and financial firms receive support remains relatively slow. More needs to be done to help these women develop a competitive advantage at critical transition points in their careers.

The Authentic Leadership programme is PIMFA's response to supporting women who face a unique set of challenges when progressing into senior leadership positions. Our research shows that women aiming to rise to leadership positions in wealth and finance still have to overcome a set of challenges, including the Imposter Syndrome, unconscious bias in the workplace, a peer group that shrinks as they assume more senior roles, and a struggle to find female role models even in the most progressive firms.



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A NEW WAY TO SUCCESS



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The Authentic Leadership programme has been specifically designed for like-minded women in wealth management, financial advisory and private banking. It offers an opportunity for learning, growth and building confidence, all of which will help women take their careers to the next level.

and confidence required for female leaders and managers in wealth management and financial services to thrive in a rapidly changing and highly complex business environment. It is a research-driven and career-changing learning experience which will not only fundamentally transform how women executives negotiate and manage teams, but also how they lead.

This CPD approved six-month group coaching programme, endorsed by the Institute of Leadership & Management, delivers the knowledge, skills

Enjoy peer support from a community of women in wealth and financial advice who are finding ways of doing success that work for them.

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AS A FEMALE LEADER OR MANAGER, THIS PROGRAMME WILL HELP YOU:

- ✓ **Create** a clear purpose and define the difference you want to make in your life and career.
- ✓ **Develop** your own unique leadership qualities and approach. It will help you unlock your potential and that of others.
- ✓ **Overcome** the fears of inadequacy and self-doubt (Imposter Syndrome) that often hold women back from achieving their life and career goals.
- ✓ **Review** current career challenges and develop problem-solving skills to overcome them.
- ✓ **Acquire** new strategies to communicate, influence and engage with stakeholders.
- ✓ **Build** supportive professional relationships and networks to support your goals.

AS A COMPANY, YOU CAN EXPECT THE PROGRAMME TO ASSIST YOUR FEMALE EXECUTIVES TO:

- ✓ Become stronger leaders who will support the firm during uncertainty and disruption.
- ✓ Be ready to step up to top-level management roles and board positions.
- ✓ Actively deliver new ideas and fresh perspectives to achieve your company's goals.
- ✓ Bring diversity of thought which assists with more extraordinary problem-solving solutions.
- ✓ Become mentors and role models to assist rising female talent within the firm.



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PROGRAMME CONTENT AND STRUCTURE



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The PIMFA Authentic Leadership programme is a six-month programme divided into six training modules, with a new module released every four weeks. It is also an arena for sharing experiences, practising the tools - as well as a place to get inspiration, support and the motivation to help you achieve your goals. This includes tools, exercises and worksheets to help you build your confidence and develop the skills required to thrive as a female leader within the wealth and finance sector.

Each of the six modules is supported by online live coaching group sessions which are invaluable for support, advice

and encouragement from the lead coach and fellow participants.

The coaching sessions are designed as a safe space to discuss questions about each of the training modules. It is also an arena for sharing experiences, and a place to receive inspiration and motivation to help you to achieve your goals.

All coaching sessions are recorded. Therefore, you can always access the stream whenever you need, regardless of whether you attended the live session or you intend to go back to check something you missed.



THE PIMFA AUTHENTIC LEADERSHIP PROGRAMME



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	MODULE 1	MODULE 2	MODULE 3
WHAT YOU WILL LEARN	<ul style="list-style-type: none">• The foundations that need to be in place to enable you to enjoy and embrace success• What causes you to be reactive - rather than proactive, resilient and resourceful• What is going on when you are at your best - feeling confident, being purposeful, interacting well with others?• What is happening when you're not - and why is this?• How to shift your state at will so that - rather than being reactive - you can be at your best, regardless of what is going on and who you are with	<ul style="list-style-type: none">• How to unlock success - the five keys to achieving your goals• What gets in the way of success and how to overcome the inevitable obstacles that arise as you move forward with your plans• Dealing with procrastination so you can bust through the mental blocks that have you stalling on taking action• How to build your motivation so you can keep going, even when the going gets tough	<ul style="list-style-type: none">• An exploration of self esteem - what it is and what it isn't - and its role in generating confidence• Why respecting and valuing yourself is the key to being a female leader with poise• What is it that inhibits your self esteem and gets in the way of you feeling confident to the core in certain situations and how to deal with this• How to build self esteem so that you can be confident in who you are and the value you bring, irrespective of what happens or what others think or do.• The importance of managing and maintaining your self esteem and how to do that so you can enjoy and embrace success on your terms.

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	MODULE 4	MODULE 5	MODULE 6
WHAT YOU WILL LEARN	<ul style="list-style-type: none"> • The role of relationships within your career and developing a strategy for relationships to enhance and progress your career • The key to creating and building mutually beneficial partnerships – rather than just transactional relationships • What gets in the way of you relating well with others and why are some people easier to partner with than others • How to clear out the blocks to connection and improve your partnering skills - so you can enjoy rich and productive interactions, even with the people you typically find difficult 	<ul style="list-style-type: none"> • How to welcome feedback and get comfortable with giving it - and how to give feedback that inspires change in others • Listening in a way that builds connection and trust and strengthens relationships • Speaking with confidence so you can communicate what you want to say and get yourself heard • The art of delegation - feel comfortable asking for support and increase your chances of getting it. Plus being OK with 'no'. How to say it so you can set and maintain boundaries & how to hear it without taking it as a rejection. • How to have difficult conversations and deal with conflict in a way that maintains and strengthens the relationship 	<ul style="list-style-type: none"> • Getting support and buy-in to your ideas • Your Authentic Leadership Toolkit and what to use when to root out limiting ways of thinking and develop the attitudes and skills that lead to success, whatever that means for you • How to live purposefully and be on purpose in all areas of your professional and personal life • Where do you go from here - setting your intentions for the future • Additional resources to help you to embrace and enjoy further success, whatever that now means for you

PROGRAMME LEADER

Caroline had a successful career in Communications. She worked for large corporations such as Time Warner and various ad agencies before moving into innovation consulting. Then, she became the European Managing Partner for Synectics (a global innovation consultancy), before she co-founded Happen, an international innovation agency which was recently acquired by Accenture.

Despite her many successes, Caroline was frequently accompanied by the nagging doubt that she didn't deserve them and wasn't good enough. Like many high achieving women, the Imposter Syndrome fuelled her fear of being found out as a fraud. In search of a different way of doing success, Caroline quit Happen and began on a path to 'reinventing' herself.

She began learning to manage the voices in her head that made her question her value and put pressure on her to operate in ways that didn't serve her. Her life achieved a positive turnaround and other people started asking her to help them do the same. This led to the birth of her current business, Attitude Coach, which is all about helping professional women to change the ways of thinking that limit them and build the attitudes and behaviours that lead to success.



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YOUR INVESTMENT



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One of the attractions of *The PIMFA Authentic Leadership programme* is the value for money it offers. The programme fees are amongst the lowest when compared with other non-sector specific online women leadership programmes.

FEES	PIMFA MEMBER RATE	NON-MEMBER RATE
	£3,750 + VAT	£4,250 + VAT

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FREQUENTLY ASKED QUESTIONS



What is the time commitment?

The programme is intentionally designed for busy female wealth and finance professionals, allowing them enough time to complete the required tasks, exercises and journal entries at a steady pace over a six month period. Moreover, with all the live group coaching sessions recorded, you can always re-visit all the supporting toolkit well after the live programme has ended.

Is the programme accredited or endorsed?

The programme is endorsed by The Institute of Leadership & Management (ILM). They also provide you with 12 month access to their award winning e-learning tool, MyLeadership. After successfully completing the ILM learning modules, you can gain letters in your name and digital credentials that recognise and prove your leadership capabilities. The programme is also accredited by the CISI.

How do I join the programme?

If you are interested in applying to join this programme, simply complete and submit the Application Form to PIMFA. If your application is successful, you will be invited to a call with Caroline Holt to discuss the outcomes you want from this programme and to determine whether this is the right next step for you at this stage in your career. Please note that completing the Application Form does not commit you to taking a place on the programme.



Talk with us today

[click here](#)



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TESTIMONIALS



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I am delighted with the results from our first cohort of attendees on Caroline's leadership programme. All feel more empowered and confident in their roles and alongside their peers, and this has had a positive effect both on their teams and the wider business.

One of the main benefits for our participants was being in a group of like-minded women and being able to discuss real-life issues in a safe setting.

Handelsbanken is a signatory to the Women in Finance Charter and as part of our commitment to supporting the progression of women into senior roles in financial services, we offered this programme to women in the business who had recently gained a promotion or taken on more responsibility.



GRAHAM TURNER,
CEO, Handelsbanken Wealth &
Asset Management



TESTIMONIALS



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This course is helping me find out about myself and what I really want to achieve - not what I think I ought to achieve or what others expect me to achieve. It is helping me explore my inner fears and desires and to recognise the demands that I put upon myself.

I have freed myself of all the negative mind talk and replaced it with purpose and positivity. I can honestly say that I am a better version of myself since I started.



IRWIN MITCHELL,
Senior Compliance Manager



EXECUTIVE DIRECTOR,
Quilter Cheviot



This is an eye-opening programme to learn about myself and others.

Caroline teaches us techniques to become the best versions of ourselves. It's a privilege to be part of a supporting network of like-minded professional women from the wealth and finance sector.

And, I've also recently received a promotion. The course definitely helped me to achieve this outcome.



TESTIMONIALS



Before starting the programme, I was in a constant cycle of battling competing priorities and feeling like I was not doing anything well. As a result, I was completely worn out and lacked focus.

I feared that signing up to the programme would be yet another thing to try and squeeze into my schedule and I wouldn't be able to dedicate the time to it. However, I am so pleased I stuck with the programme and have made lots of changes, as a result, which have had a big impact. I finally took the time to step back and assess what was

really important to me. I've moved into a new role within the same organisation, which is providing the work/life balance I craved and fulfilling my desire to help people, whilst focusing on my continued professional development.

And, as importantly, I now prioritise precious time with family and friends and making memories."



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**DEPARTMENT HEAD,
Handelsbanken**

TESTIMONIALS



MANAGER,
Church House Investment



Before I started this programme, I knew something wasn't right. I wasn't happy and was feeling vulnerable and alone and unsure how/what to change to reach a better outcome. It was time to confront and change my long practised behaviours that were holding me back and keeping me in this state.

This course has provided a safe and friendly atmosphere in which to explore these behaviours with simple tools to guide me in the process of recognising, challenging and changing for the better.

It's been amazing to join with other ladies and share similar thoughts and experiences. We are not alone; we work things out together.

And, I am glad I took this opportunity. It has been hugely beneficial in helping me to tease out fact from fiction and decide what I truly want for myself and others around me.



TESTIMONIALS



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I'm five years into my career and looking to progress to a more senior position with more responsibility.

I'm already dealing with senior stakeholders who are all older and more experienced than myself and often felt intimidated, believing my views weren't worth as much as these stakeholders. In particular, it was difficult to disagree with them, as the voice in my head would always say that the other person knew more than me. This would often lead to me beating myself up – wondering why I didn't challenge when I knew I should, which undermined

my confidence still further. I'd end up convincing myself I was no good – despite positive feedback to the contrary.

The programme has helped me to identify the 'gremlins' – the voices in my head that were undermining my self-confidence - and to manage them and debunk their untruths. Now that I'm aware of my mind talk, I can recognise what is fact and what is fiction so will be more able to manage self-doubt in the future and progress more successfully in my career.



**COMPLIANCE OFFICER,
FTSE 250 Bank and Wealth Manager**

PIMFA