



## Krista K. Linn, CFA

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### Director, Senior Portfolio Manager



Krista K. Linn, CFA, is a Senior Portfolio Manager and Director at Bartlett Wealth Management, providing investment management services to high net worth individuals and their families, foundations, endowments and institutions. With more than 35 years of experience, Krista specializes in investment strategy, ESG investing, succession planning and women in transition. She is a Chartered Financial Analyst.

Krista is passionate about teaching individuals the importance of saving, at any age, and empowering them to pursue their financial goals utilizing a customized, tax-sensitive approach to investing.

Prior to its merger with Bartlett Wealth Management, Krista was a Managing Director and Portfolio Manager at Lodestar Investment Counsel, LLC. Krista received her Master of Business Administration from Illinois State University and volunteers on the Board of Trustees for The Chicago Academy for the Arts.

#### Areas of Expertise

Investment strategy  
ESG investing

Succession planning  
Women in transition