

Helping Member Firms and Their Teams

Be Career Ready, at Every Stage

Professional Development Programs at Money Management Institute

Program	Industry/Professional Experience	Duration
 <p>EXECUTIVE IQ By Money Management Institute</p>	10-20+ Years	1 Year
 <p>LEADERSHIP PATHWAY By Money Management Institute</p>	5-10 Years	2 Years
 <p>ACADEMY By Money Management Institute</p>	1-5 Years	3 Weeks

MMI is committed to a culture of continuous learning and to helping member firms and their teams be “career ready, at every stage”



Leadership Pathway by Money Management Institute

is a distinguished community and professional development program for emerging investment leaders (with 5-10 years of experience). This program promotes networking, collaboration, education, mentorship, and leadership.



Highlights

Leadership insights

- Participants meet monthly to meet and hear from thought leaders both inside and outside of the industry about industry trends, career experiences, advice, and development

Coaching

- Participants can opt in to small coaching circles each quarter that feature a designated topic and are facilitated by an executive coach
- Participants learn their Talent DNA through the CliftonStrengths® assessment, which describes what they naturally do best or what they need help from others to achieve

Mentor relationship

- Each participant is carefully matched with a senior level industry leader to work with throughout their term in the program

MMI conferences, forums, and webinars

- Registration discounts are available for participants to attend in-person and virtual events
- Participants are invited to attend program focused meetings onsite at the MMI Summit (March) and Annual Conference (October)

Industry networking

- In addition to networking at MMI events, participants are offered numerous opportunities to network with program peers and industry colleagues both in-person and virtually
- Participants are assigned “pods” to forge personal connections, share ideas and best practices, sharpen lessons learned, and offer peer support

Education

- Participants receive access to an online curriculum, industry research, and publications

Public speaking and collaboration opportunities

- Participants and alumni collaborate to plan and execute the annual in-person Leadership Pathway Seminar where participants join panels with seasoned industry experts to discuss industry topics, career journeys, and leadership development

Investment

- \$750 one-time program fee (includes programming, curriculum, mentorship, and virtual networking components)
- MMI conference registration costs
- Travel expenses associated with attending MMI conferences

Return on Investment

FOR PARTICIPANTS

- Increased professional and social interaction across the MMI community
- Firsthand exposure to education and thought leadership offered through MMI
- Industry recognition for contributions made through the program
- Exposure to a broad range of financial services industry firms

FOR PARTICIPANTS' FIRMS

- Internal recognition of up-and-comers, top contributors, and leaders within the organization
- Complement firm's internal development programs for their up-and-coming leaders
- Elevated awareness of the firm and brand within the MMI community
- Tangential benefits related to skills development through problem-solving initiatives, program participation, etc.



Time Commitment

- 2 years (June 2024 – June 2026)
- About 20 hours per year of programming

Applicant Requirements

- Must have at least 5 years and up to 10 years investment management experience
- Must be nominated by their firm to participate
- Must have growing responsibility within his or her firm and potential for next level responsibility
- Must possess leadership qualities and track record of service within their firm, industry, or community organizations
- Must be willing to promote the growth and development of MMI

2024–2026 Schedule

- Orientation in June 2024
- 2024 MMI Leadership Pathway Seminar
Denver, CO • June 12–14
- Mentorship (ongoing)
- Insight Calls – Last Tuesday of every month at 12 PM ET
- 2024 MMI Annual Conference
Charlotte, NC • Oct 15–17
- Pods (ongoing)
- Coaching (ongoing)
- Curriculum (ongoing)
- 2025 MMI Summit
Fort Lauderdale, FL • March 27–28
- 2025 MMI Leadership Pathway Seminar
Location TBD • June
- 2025 MMI Annual Conference
- 2026 MMI Summit
Orlando, FL • March 19–20
- Graduation in June 2026





Testimonials

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Many thanks to MMI's Leadership Pathway team for instilling in me this lifelong desire to learn.”

“Till this day (so many years after graduating), I still have a great relationship with my mentor.

“The exposure to senior leaders in the industry that this program offers is unrivalled.”

—Alumni on the Leadership Pathway program





To learn more and apply, please visit:
mminst.org/leadership-pathway

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