

# PREPARING YOU FOR WHAT'S NEXT

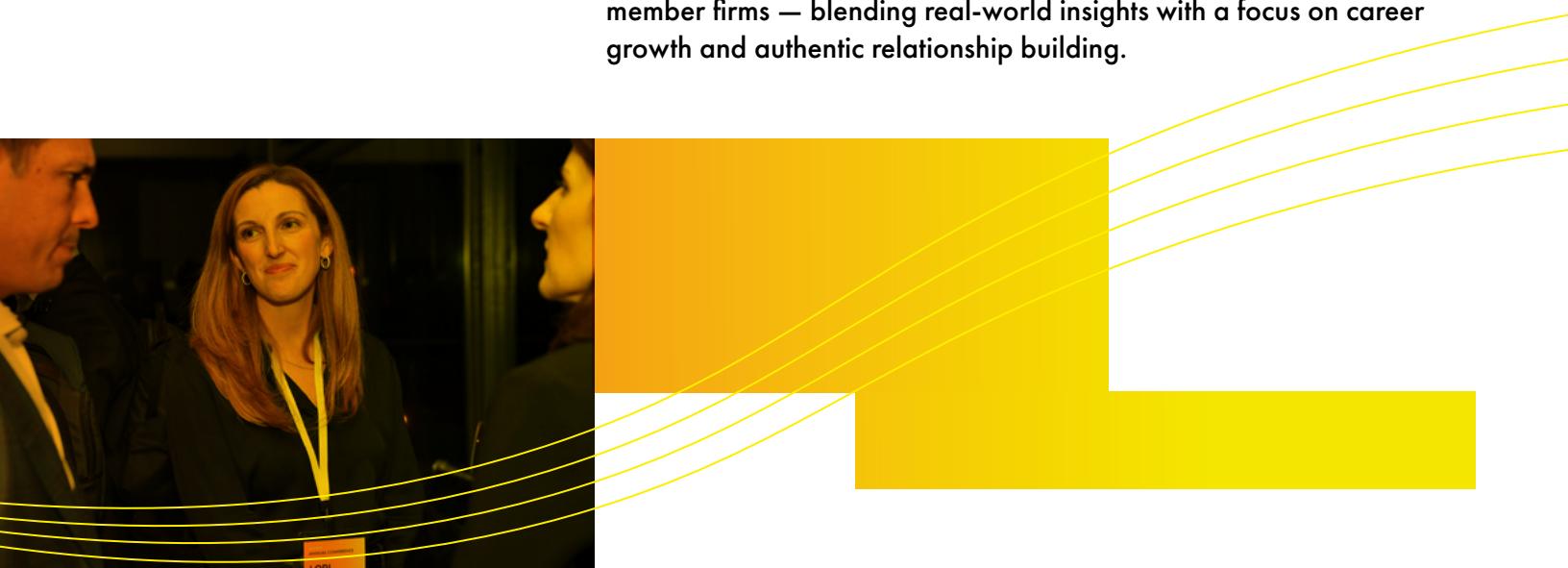
No matter where you are in your career



PARTICIPATE WITH INTENT.  
SOLVE TOGETHER.  
THINK FORWARD.

# PROGRAMS THAT INSPIRE. CONNECTIONS THAT ENDURE.

With a member network representing 95% of the investment advisory ecosystem, Money Management Institute (MMI) offers an unparalleled perspective on what it takes to advance a career in the industry. Each program is developed in collaboration with top academic institutes and member firms — blending real-world insights with a focus on career growth and authentic relationship building.



## CRAFTED BY MEMBERS, FOR MEMBERS.

Our programs are developed in partnership with senior leaders from top asset managers, wealth managers, and solution providers, so content reflects your real-world industry challenges and opportunities.

## POWERED BY WORLD-CLASS INSTITUTIONS.

Each program is designed and delivered in collaboration with best-in-class academic institutions such as University of Virginia Darden Executive Education & Lifelong Learning, NYU Stern Executive Education, and Duke Corporate Education to ensure a rigorous and high-quality curriculum.

## EMBEDDED IN THE ECOSYSTEM.

MMI sits at the center of the investment advisory ecosystem, with more than 200 member firms and a network of 12,000+ professionals. We offer timely, relevant content and unmatched access to peers, mentors, and innovators shaping the industry.

## TAILORED FOR EVERY CAREER STAGE.

From early-career professionals to senior leaders, MMI offers programs designed for every stage of your career — with each experience purpose-built to drive real momentum.

## AN ACCELERATOR FOR FOSTERING MEANINGFUL RELATIONSHIPS.

MMI programs serve as a powerful accelerator for forging cross-industry connections that drive lasting success. While 80% of participants are new to MMI, by program completion they become among our most engaged members — embedded in a vibrant network of peers, mentors, and alumni who can support their careers for the long term.

# INVEST IN YOURSELF. SHAPE YOUR FUTURE.

Explore the options below to find the experience that aligns with your background and goals.

From senior leaders to early-career professionals, MMI offers programs thoughtfully crafted for every stage of your career journey. Invest in your future with opportunities to elevate your skills and knowledge, expand your network, and pursue personal growth that goes beyond career milestones.

FOR THE SENIOR LEADER	FOR THE EMERGING LEADER	FOR THE EARLY-CAREER PROFESSIONAL
<b>10–15+ years of experience</b>  <b>Driving innovation, strategy &amp; business transformation</b>  You lead teams, align functions around strategic priorities, and propel growth while navigating a constantly evolving financial landscape. But with disruption increasing, your challenge is staying ahead — harnessing leadership skills and a growth mindset to transform change into opportunity.  You need more than theory. You need a graduate-level program that combines strategic thinking with practical tools in AI, data analytics, and innovation leadership.	<b>5–10 years of experience</b>  <b>Building influence, confidence &amp; a network</b>  You're stepping into leadership and being asked to take on more responsibility across teams and initiatives. The challenge is making the shift from contributor to leader while building the confidence and skills to lead effectively.  You need a thoughtfully designed program where mentorship and relationship building are at the core — offering real-world guidance and perspective while helping you build your leadership presence and grow your professional network.	<b>Under 5 years of experience</b>  <b>Developing core skills &amp; industry knowledge</b>  You're new to the industry, eagerly developing your core skills and industry knowledge while navigating new responsibilities in a fast-paced environment. This stage is a cornerstone of your professional journey — a time when you may not yet know what you don't know.  You need a hands-on program that will surround you with tangible learning experiences and peer collaboration. More than just skills, you're looking for connections that will guide and support you as you step forward confidently into your career journey.
YOUR PROGRAM	YOUR PROGRAM	YOUR PROGRAM
 <b>EXECUTIVE IQ<sup>®</sup></b>	 <b>LEADERSHIP PATHWAY</b>	 <b>ACADEMY</b>

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# EXECUTIVE IQ®

For senior executives with  
10–15+ years of experience  
driving strategy, innovation, and  
organizational transformation.

Executive IQ® by Money Management Institute empowers senior leaders with the frameworks and tools to lead through disruption and drive strategic innovation. Developed in collaboration with the University of Virginia Darden Graduate School of Business, the program combines graduate-level teaching and learning with practical, real-world applications. Participants gain exposure to emerging technologies like AI, learn to apply the constructs of organizational design and disruptive innovation, and explore new approaches to leadership, organizational change, and cross-functional collaboration. More than a credential, Executive IQ helps senior leaders build the capability and confidence to shape the future of their firms and drive the industry forward.

## IN COLLABORATION WITH



**DARDEN**  
Executive Education  
& Lifelong Learning

Darden Executive Education & Lifelong Learning is a top-ranked, global provider of executive development delivered by the University of Virginia Darden School of Business. Our programs are taught by Darden's world-class faculty — ranked No. 1 for "Best Professors" by The Princeton Review (2025) and recognized by The Economist for the No. 1 education experience in the U.S. with the top global student & alumni rating of faculty (2022). As part of the No. 1 public business school in America (U.S. News & World Report, 2025), Darden Executive Education prepares and inspires leaders to thrive amid transformation and disruption in a global marketplace.

# PROGRAM FOUNDATIONS

## HOW WE HELP YOU UNLOCK OPPORTUNITY THROUGH THE EXECUTIVE IQ PROGRAM



All the employees I've sent through Executive IQ say it's the best development opportunity they've ever had. They've built lasting relationships and brought back valuable insights that have strengthened their own leadership and their teams."

HEAD OF US WEALTH,  
ASSET MANAGER

### REAL-WORLD EXPERIENCE & INSIGHT

Leadership starts with understanding the complexities of your industry. Through a case-based curriculum and immersive on-campus sessions, you'll gain practical knowledge and peer connections that ground your decision-making.

### ESSENTIAL SKILLS THAT MOVE YOU FORWARD

Effective leaders don't just learn — they practice. Darden's discussion-driven, case-method workshops develop sharp analytical thinking, inventive problem-solving, and practical mastery of innovation leadership and AI, with immediate takeaways you can use on Monday morning.

### PRACTICAL APPLICATION THROUGH COLLABORATION

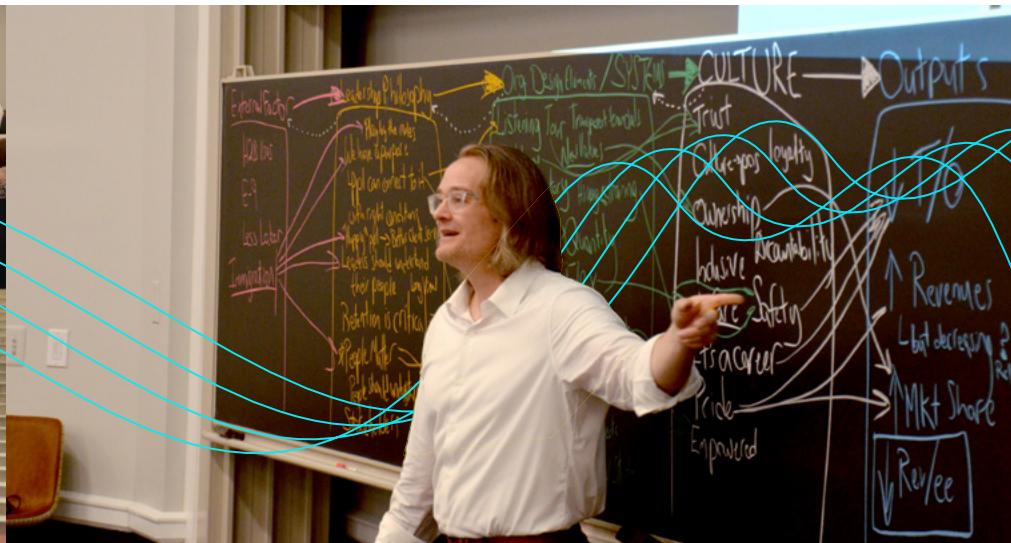
Theory matters only if you can apply it. By working on team projects you'll tackle real-world challenges, preparing you to deliver results back at work.

### PERSONALIZED COACHING AND GROWTH

True leadership growth comes from reflection and tailored development. One-on-one coaching and personal assessments help you understand your strengths and identify opportunities to improve.

### A NETWORK OF SUPPORT

Leadership is not a solo journey. By joining small learning pods and accessing a broad network of senior financial leaders, you have guidance, feedback, and collaboration every step of the way. Plus, you'll tap into Executive IQ's broader network of alumni through events and communities designed to keep you connected and inspired even after graduation.



# PROGRAM OVERVIEW

**DURATION:**

1 year (May 2026–May 2027)

**TIME COMMITMENT:**

6 hours per month

**FORMAT:**

Hybrid (virtual + two in-residence sessions at UVA Darden)

## APPLICATION REQUIREMENTS

- Must have a minimum of 10 years of management experience
- Must have rich work experience, including managerial responsibility
- Must have a record of high achievement and a passion to advance management practices and make a broader impact in their organization and the industry

## 2026 - 2027 SCHEDULE AT A GLANCE

Cohort 6: May 2026 – May 2027

**TERM #1****LEADING SELF AND OTHERS**

- Personal Assessment
- Coaching Session
- Pod Discussions and Networking
- **June 2–4, 2026:** Darden-in-Residence Session
- UVA Darden Leadership Case Study Series
- Initiate Leadership Development Plan

**TERM #2****LEADING WITHIN THE ENTERPRISE**

- UVA Darden Data-Driven Decision-Making Case Study Series
- Industry Case Study Series
- UVA Darden Strategic Planning & Execution Course
- Pod Discussions
- Coaching Sessions

**TERM #3****LEADING THE INDUSTRY**

- **February 2–4, 2027:** Darden-in-Residence Session
- UVA Darden Leadership through Innovation Case Study Series
- Coaching Session
- Capstone Innovation Project

# PROGRAM BENEFITS

## FOR THE PARTICIPANT

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**A certificate** in leadership and innovation from the UVA Darden School of Business to evidence your professional growth.

**Preparation to lead** in a rapidly evolving business landscape with critical skills in innovation, digital transformation, and data analytics.

**Executive coaching** that sharpens your leadership style, uncovering blind spots and strengthening personal effectiveness.

**Access to a trusted peer network** of participants and alumni across the industry.

## FOR THE PARTICIPATING FIRM

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**Meet your firm's future talent needs** by proactively building the most in-demand skills anticipated in the labor market over the next 5-10 years.

**Your leaders apply their skills in the real world** with the Capstone Innovation Project, where they tackle pressing business challenges.

**Enhance leadership capabilities** by developing participants' strategic thinking, growth mindset, and ability to navigate complex challenges.

**Achieve impactful results** for participants through a cost-effective blended learning model that combines industry research, practical insights, and personalized coaching – imparting knowledge and tools that senior leaders can share and use with their teams in real time.

## INVESTMENT

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Email [learning@mminst.org](mailto:learning@mminst.org) or call (646) 868-8511 for specific details.

- One-time program fee (includes tuition, most meals while onsite, teaching materials, and certificate of participation)
- Travel expenses associated with attending in-person residencies and MMI conferences
- Participants receive discounts to MMI Conferences during their participation in the program and for one year after successfully completing the program
- Discounts are available for firms sending multiple participants, as well as for early commitments

# WHAT PARTICIPANTS ARE SAYING



[The Program] encouraged an atmosphere where we can share and hear different perspectives, learn how to think and respond differently, approach conflicting opinions, and communicate better – all of which are strengths of a good leader.”



All the sessions challenged the way we saw [ourselves] and our current ways of thinking.”



I've already incorporated change within my teams because of the Reflected Best Self exercise.”



I have particularly enjoyed the balance of instruction and perspectives from the participants. There are a lot of impressive leaders in the program, and they can add a lot to the sessions.”

— EXECUTIVE IQ ALUMNI



**98%**

Of participants would recommend Executive IQ to a colleague.

**100%**

Of participants say the program has provided an effective learning experience.

**100%**

Gave the Darden-in-Residence experience high scores for the quality of material and faculty delivery.

Source: 2025 and 2024 combined participant graduation survey data



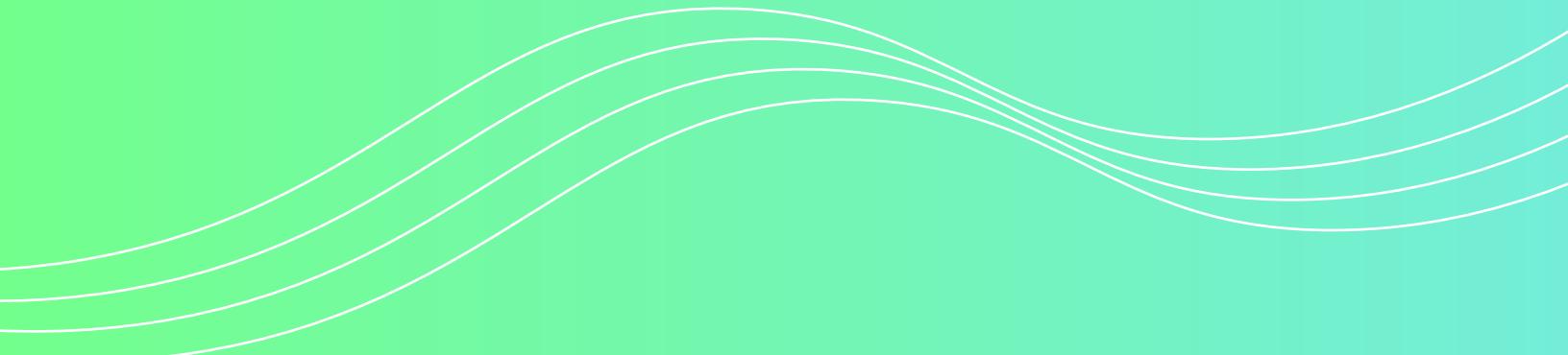
# LEADERSHIP PATHWAY

**For emerging industry leaders with 5–10 years of experience who are stepping into leadership roles and growing their influence across teams and organizations.**

Leadership Pathway is a two-year professional development program and community designed for emerging leaders ready to take on greater responsibility and grow with purpose.

Central to the program is the annual Leadership Pathway Intensive, delivered in collaboration with Duke Corporate Education, which offers an immersive, in-person experience focused on leadership skills, strategic thinking, and real-world challenges. Complemented by monthly virtual sessions, executive coaching circles, and curated peer pods, participants also benefit from mentorship by senior industry leaders and a powerful peer network.

Through assessment tools and practical learning, participants strengthen their leadership presence, navigate complex dynamics, and clarify their leadership styles — accelerating growth and preparing high-potential professionals to lead with confidence.



## LEADERSHIP PATHWAY INTENSIVE IN COLLABORATION WITH



Originating out of Duke University and the Fuqua School of Business, Duke Corporate Education combines the principles of leadership with academic research and insights to accelerate business transformation.

We are recognized as global leaders in designing world-class leadership experiences.

# PROGRAM FOUNDATIONS

## HOW WE HELP GUIDE YOU TO OWN YOUR GROWTH THROUGH THE LEADERSHIP PATHWAY PROGRAM



The program has encouraged me to set aside time for professional development in a way I can't during my day-to-day job. It has led to me taking time to reflect on my strengths and weaknesses and how to build my brand."

LEADERSHIP PATHWAY ALUMNI

### INSIGHTS THAT INSPIRE

Gain monthly access to thought leaders from inside and outside the industry who share valuable perspectives on career growth, leadership, and emerging business trends.

### MEANINGFUL MENTOR RELATIONSHIPS

Be paired with a senior-level industry leader who will guide and support you throughout your journey, providing personalized mentorship tailored to your goals.

### NETWORKING & PEER SUPPORT

Gain unparalleled access to peers and industry professionals through networking opportunities and small pods designed for sharing ideas, best practices, and peer support.

### SUPPORTIVE COACHING

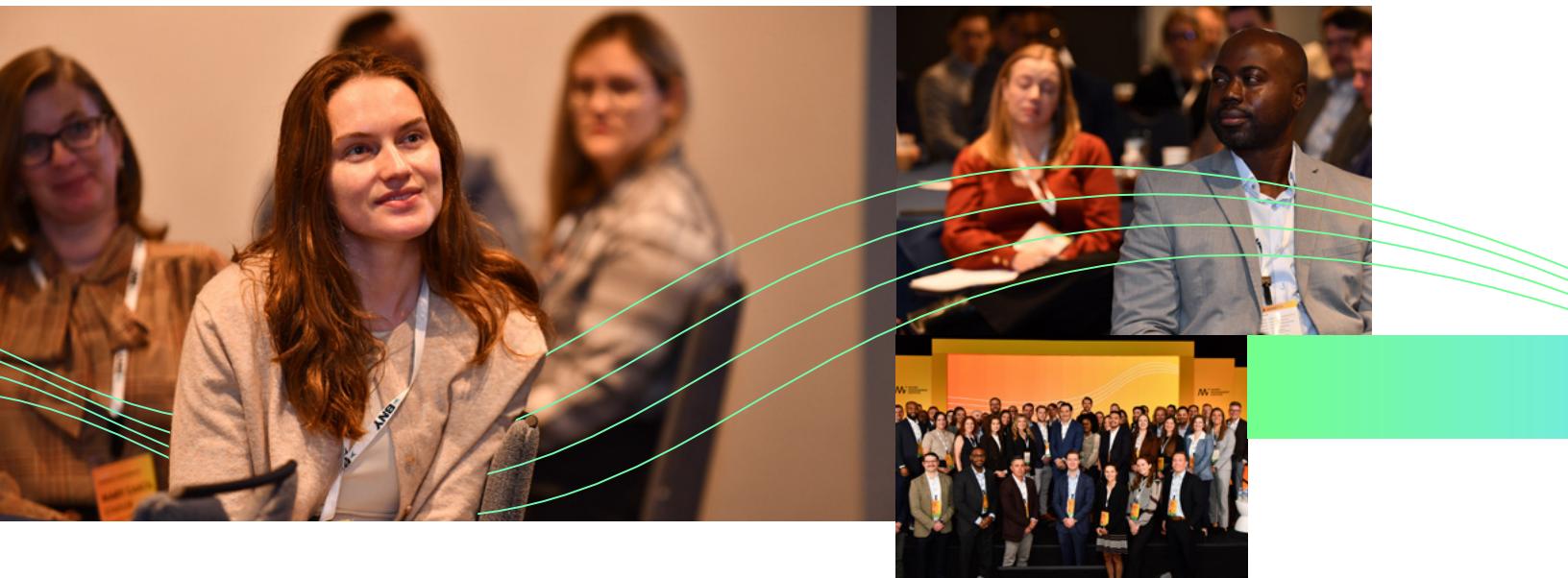
Engage in optional quarterly coaching circles focused on key topics and led by experienced executive coaches. Gain deeper self-awareness and identify your strengths and development areas through two personalized assessments.

### CONTINUOUS LEARNING RESOURCES

Access an online curriculum, industry research, and publications that keep you up to date on relevant issues throughout your journey.

### LEADERSHIP IN ACTION

Collaborate with fellow participants and alumni to organize and deliver the annual Leadership Pathway Intensive, featuring panels and discussions with experienced industry veterans.



# PROGRAM OVERVIEW

**DURATION:**

2 years (June 2026 – June 2028)

**TIME COMMITMENT:**

~20 hours/year

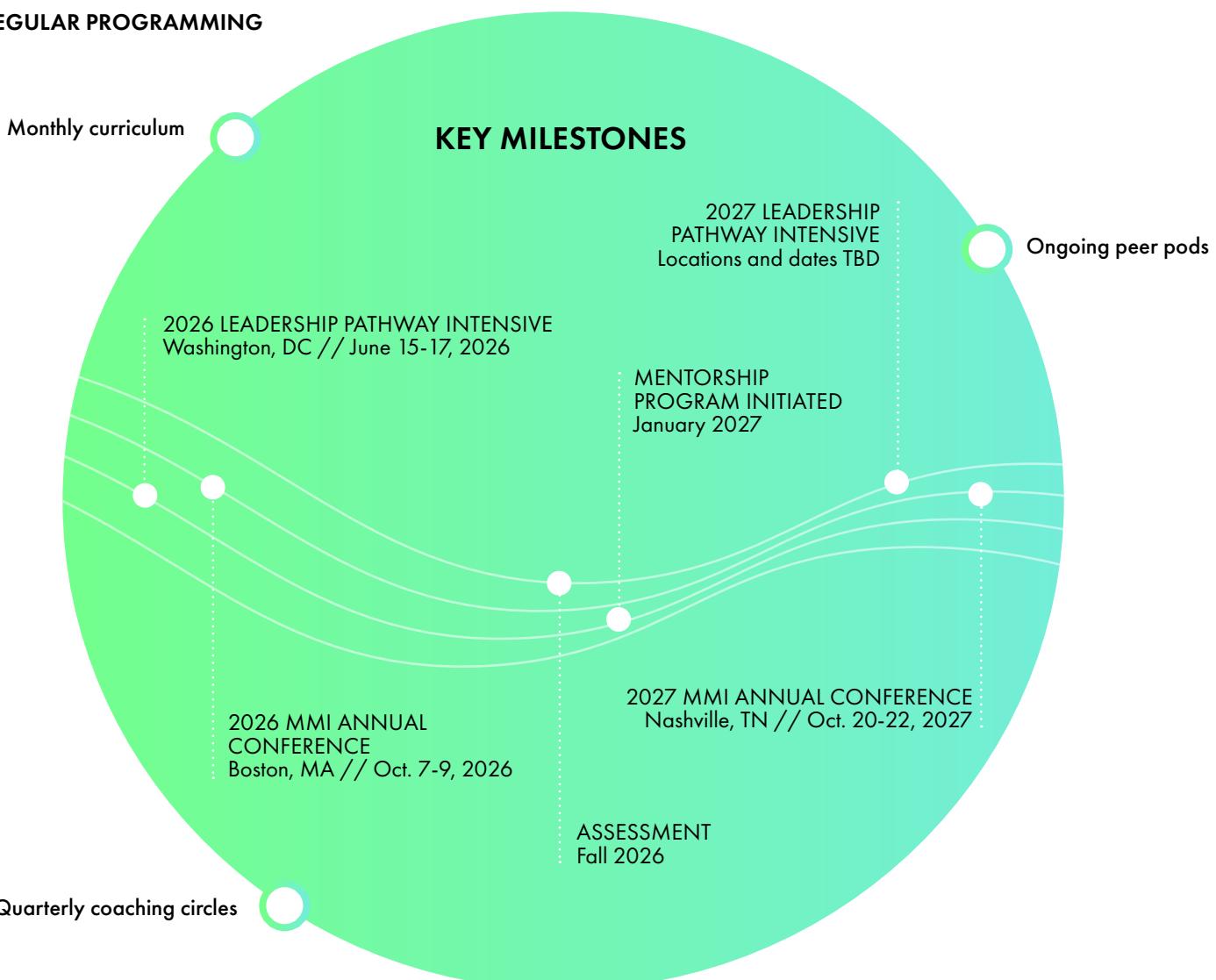
**FORMAT:**

Hybrid (virtual curriculum, curated pods, coaching circles) with in-person experiences (Leadership Pathway Intensive + access to MMI events)

## APPLICATION REQUIREMENTS

- Minimum five years of experience; maximum 10 years of experience
- Must have a record of high achievement and a passion to advance management practices and make a broader impact in their organization and the industry
- 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

## 2026 - 2027 SCHEDULE AT A GLANCE

**REGULAR PROGRAMMING**

# PROGRAM BENEFITS

## FOR THE PARTICIPANT

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**Accelerated leadership growth** helps you develop strategic thinking, executive presence, and decision-making skills to prepare for senior roles.

**Exclusive learning experiences** provide insights from top industry experts and Duke Corporate Education faculty through immersive, real-world sessions.

**Mentorship & coaching** connects you with seasoned executives and peer circles for personalized guidance and support.

**Enduring industry network** enables you to build lasting relationships with a diverse group of emerging leaders across the industry.

**Career visibility & impact** strengthens your professional brand and expands opportunities for advancement within the investment advisory community.

## FOR THE PARTICIPATING FIRM

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**Showcase and retain talent** by highlighting and rewarding high-potential professionals, signaling clear advancement paths, and boosting retention of your top performers.

**Augment internal development** by complementing your firm's training programs with a proven, industry-wide leadership experience led by Duke Corporate Education and seasoned MMI experts.

**Strengthen industry presence** to elevate your firm's visibility and reputation within the MMI community and the broader investment advisory ecosystem.

**Energize your firm** with leaders who return more connected and industry-engaged — bringing fresh perspectives, expanded networks, and actionable insights that strengthen teams.

## INVESTMENT

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Email [learning@mminst.org](mailto:learning@mminst.org) or call (646) 868-8511 for specific details.

- One-time fee includes virtual programming, curriculum, mentorship, and networking components outside of Leadership Pathway Intensive
- Two-day immersive Leadership Pathway Intensive available as separate cost, with discounts available for early commitments
- Travel and lodging expenses associated with attending Leadership Pathway Intensive and MMI conferences
- Participants receive discounts to MMI Conferences during their participation in the program and for one year after successfully completing the program

# WHAT PARTICIPANTS ARE SAYING



My experience in Leadership Pathway has been one of opportunities presented to me and opportunities then taken advantage of. To me that's what programs like this can do best and should keep doing — keep presenting great opportunities for growth, development, and relationship building."



Many thanks to MMI's Leadership Pathway team for instilling in me this lifelong desire to learn. I still have a great relationship with my mentor. The exposure to senior leaders in the industry that this program offers is unrivaled."



I love the mentor aspect of this program as I have a wonderful relationship with mine. In addition, I like the monthly call structure as well as the small pod groups ... the networking is a huge plus."

— LEADERSHIP PATHWAY ALUMNI

**68%**

Of participants received a promotion since the start of the Leadership Pathway program.

**96%**

Of participants would recommend the program to another colleague.



**96%**

Of participants agreed that overall, this program has provided an effective learning experience.

\*Source: Class of 2023 graduation survey data – June 2025



# ACADEMY

**For early-career investment professionals with under five years of experience who are building foundational skills and exploring the future of their careers in financial services.**

Academy is a three-week professional development experience for early-career investment professionals looking to build a strong foundation and fast-track their growth. Designed in collaboration with NYU Stern Executive Education, the program combines graduate-level coursework, immersive workshops, and an in-person learning experience. Participants sharpen their leadership skills, deepen their industry knowledge, and gain exposure to real-world challenges through sessions led by seasoned faculty and senior industry professionals. With co-branded credentials and a growing network of peers, Academy helps rising talent develop the confidence, clarity, and connections to take the next step in their careers.

## IN COLLABORATION WITH



NYU Stern Executive Education inspires and equips executives to innovate, lead, and transform themselves and their organizations. We believe in the tremendous potential of individuals and organizations to solve global problems through the power of business. At NYU Stern, expert faculty will challenge you to expand your vision, re-evaluate your preconceptions, and achieve your professional goals.

# PROGRAM FOUNDATIONS

## HOW WE HELP IGNITE YOUR PROFESSIONAL DEVELOPMENT AND INDUSTRY AWARENESS IN JUST THREE WEEKS.



Academy was an incredible program that I feel lucky to have been a part of. Not only did I learn so much in a short amount of time, but I was able to connect with other like-minded young professionals across the industry that I keep in touch with!"

ACADEMY ALUMNI

What sets Academy apart is its fusion of real-world application and academic principles. More than a traditional learning program, it immerses participants in the full investment-advisory ecosystem — covering practice management, portfolio construction, client engagement, and the business dynamics that drive growth — while integrating graduate-level concepts and thought leadership that inspire critical thinking and strategic insight.

Immersive, hands-on workshops at leading industry firms connect academic theory with practical impact, equipping you with insights that shape your career.

The in-person residency at NYU Stern School of Business offers a powerful environment for personal growth and networking, while the co-branded certificate from NYU Stern Executive Education stands as a testament to a commitment to continuous improvement and professional excellence.



# PROGRAM OVERVIEW

**DURATION:**

3 weeks (May–June 2026)

**TIME COMMITMENT:**

~6 hours per week in first and third weeks; two full in-person days during Week #2

**FORMAT:**

Hybrid (virtual learning with an in-person residency at NYU Stern campus)

## APPLICATION REQUIREMENTS

- Must have under five years of investment management experience
- Must be identified by the sponsoring firm as an emerging talent and a future leader

## 2026 SCHEDULE AT A GLANCE

### WEEK #1 MAY 4-8, 2026

#### VIRTUAL WELCOME WEEK + SESSIONS

Engage in dynamic virtual prep sessions and networking designed to build a strong community among participants. These sessions will equip you with a shared, in-depth understanding of the financial services ecosystem and essential industry requirements, setting the stage for your accelerated career journey.

### WEEK #2 MAY 18-22, 2026

#### IN-PERSON LEARNING WEEK

Experience the power of collaboration and connection as the cohort comes together for an immersive week of learning — combining NYU Stern sessions with Industry Workshops hosted by leading MMI member firms. This unique blend of academic insight and real-world engagement sparks new ideas, builds lasting relationships, and accelerates growth.

### WEEK #3 JUNE 1-5, 2026

#### VIRTUAL SESSIONS + PROGRAM GRADUATION

Close out the Academy with virtual sessions designed to help you develop a clear action plan on how to leverage your strengths effectively. These sessions will round out your industry knowledge and provide personalized executive coaching to put your learning to the test — leaving you with a strong foundation and a focused roadmap for the next stage of your career journey.

# PROGRAM BENEFITS

## FOR THE PARTICIPANT

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**Experience hands-on learning** combined with real-world industry exposure.

**Gain practical tools** that are effective regardless of your sector or level of experience.

**Receive a clear action plan** to leverage your strengths and make a meaningful impact at your firm.

**Expand your network** by connecting with peers you can learn from and collaborate with.

**Enjoy ongoing networking** and stay current with industry trends through dedicated alumni programming designed to keep you connected and informed long after the program ends.

## FOR THE PARTICIPATING FIRM

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**Retain and grow your key talent** through targeted development initiatives that demonstrate your commitment to their career progression.

**Accelerate industry knowledge** as participants return with sharper market intelligence, as well as broader insights into trends, competitive practices, and client needs, to enrich your firm's strategic decision-making.

**Expand and deepen networks** by connecting your talent to a diverse community of industry peers, mentors, and leaders, building relationships that foster collaboration and new opportunities.

## INVESTMENT

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Email [learning@mminst.org](mailto:learning@mminst.org) or call (646) 868-8511 for specific details.

- One-time fee includes tuition, most meals while onsite, teaching materials, and certificate of participation
- Travel and lodging expenses associated with attending in-person residency
- Discounts available for early commitments
- Upon completing the program, participants receive a one-time discount to attend the MMI Annual Conference.

# WHAT PARTICIPANTS ARE SAYING



The MMI Academy program provided an in-depth, comprehensive learning experience that was highly relevant to my professional growth. The modules were well-structured, and the trainers were both knowledgeable and engaging... The networking opportunities with industry professionals were valuable, and the overall support throughout was excellent."



The professors and leaders of the program were the best part, their willingness to impart knowledge and passion for the program is apparent and infectious."



The biggest strength is bringing together a group of young professionals that normally wouldn't interact much. It was great to grow my network ... and I think these connections will be maintained for the future."

— ACADEMY ALUMNI



**92%**

Of participants agreed that overall, this program has provided an effective learning experience.

**94%**

Of participants would recommend the program to another colleague.

**81%**

Left the program with more energy.

Source: Class of 2025 graduation survey data - April 2025

# PROGRAM OVERVIEW

## MMI Professional Development Opportunities

A quick guide to see how each program can support a different stage of your career journey.

	Executive IQ For senior leaders	Leadership Pathway For emerging leaders	Academy For early-career professionals
<b>Years of industry experience required</b>	10-15+ years	5-10 years	Less than 5 years
<b>Designed in collaboration with...</b>	UVA Darden Executive Education & Lifelong Learning	Duke Corporate Education (for Leadership Pathway Intensive only)	NYU Stern Executive Education
<b>Format</b>	Hybrid: Online curriculum, team projects + 2 in-person residencies at UVA Darden	Hybrid: Virtual programming, pods, coaching & mentorship + live events, including annual Leadership Intensive	Hybrid: Online modules + in-person residency at NYU Stern
<b>Time commitment</b>	<b>1 year (May 2026 – 2027)</b> Approx. 6 hrs/month + full-time residencies	<b>2 years (June 2026 – 2028)</b> Approx. 20 hrs/year + full-time Intensive	<b>3 weeks (May – June 2026)</b> Approx. 6 hrs/week + full-time residency
<b>Topics covered</b>	Focuses on innovation, digital transformation, design thinking, and applied AI — designed to help senior leaders lead change and shape firm strategy.	Build leadership skills, confidence, and industry insight through the Leadership Pathway Intensive, coaching circles, and practical projects.	Emphasizes industry acumen, communication, collaboration, and early leadership skills — paired with real-world exposure through firm visits and applied workshops.
<b>Certification</b>	UVA Darden School of Business Certificate in Leadership & Innovation	MMI Certificate of Participation and Duke Co-Branded Certificate of Completion for Leadership Intensive	NYU Stern Co-branded Certificate of Participation
<b>Deadline to apply</b>	Opens Nov. 2025 and closes <b>April 30, 2026</b>	Opens Nov. 2025 and closes <b>May 22, 2026</b>	Opens Nov. 2025 and closes <b>April 30, 2026</b>
	   EXECUTIVE IQ <sup>®</sup>	   LEADERSHIP PATHWAY	   ACADEMY

# READY TO ACCELERATE YOUR CAREER GROWTH?

Three programs. One network. Unlimited opportunity.



For more information about Money Management Institute's Professional Development Programs, please contact:

**[learning@mminst.org](mailto:learning@mminst.org)**

**(646) 868-8511**

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