



Leadership Pathway

What

MMI's Leadership Pathway is a program designed to recognize talented and motivated individuals in the next generation and engage them in MMI activities in which they will learn from industry experts and network with peers. The program's goal is to develop the leadership and collaboration skills that will equip participants to assume increasing levels of responsibility and actively contribute to addressing critical industry issues and opportunities.

CONNECT,
KNOW & GROW
OUR NEXT GENERATION
OF INVESTMENT
ADVISORY SOLUTIONS
LEADERS

MISSION
To develop leadership skills that will equip participants to assume increasing levels of responsibility in addressing industry challenges and opportunities

How

Program activities

- MMI conferences, forums, and NetMeetings (registration discounts available for participants)
- Special breakout sessions and/or tracks at major conferences
- Committee involvement (e.g., Digitally-Enhanced Advice, Legal & Compliance, Technology & Operations, Women in Wealth Management)
- Participants will be matched with a mentor from MMI's primary contact list or MMI's Board of Governors
- Further education and training through case studies, industry research, or special projects
- Planning and executing the Leadership Pathway Seminar
- Networking events such as regional educational workshops
- Participants will serve as MMI ambassadors at their respective firms, disseminating MMI information and research to colleagues



Who

Participants

- Participants are nominated by their firm; one nomination per firm
- 30 participants in each two-year program

Requirements for the ideal candidate

- Must have five to ten years of Investment Advisory or Wealth Management experience
- Must have growing responsibility within his or her firm and potential for next level responsibility or role
- Must possess leadership qualities and track record of service within their firm or to industry or community organizations
- Must be willing to promote the growth and development of MMI
- Must meet commitment requirements on Page 5

“THE MENTOR/MENTEE PROGRAM HAS BEEN SUCH A VALUABLE PART OF THE LEADERSHIP PATHWAY PROGRAM. MY MENTOR HAS HELPED ME EXPAND MY NETWORK BY PROVIDING IMPORTANT INTRODUCTIONS I WOULDN'T HAVE HAD THE OPPORTUNITY TO MAKE OTHERWISE. ONE INTRODUCTION IN PARTICULAR HAS PROVED INVALUABLE—I WAS IN THE PROCESS OF FILLING AN OPEN POSITION ON MY TEAM AND MY MENTOR'S REFERRAL TURNED OUT TO BE MY TOP CANDIDATE AND NEW HIRE!”

—LEADERSHIP PATHWAY ALUMNI

Why

Benefits for participants

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

Benefits for participants' firms

- Internal recognition of up-and-comers, top contributors, and leaders within the organization
- Elevated awareness of the firm and brand
- Tangential benefits related to skills development through problem-solving initiatives, program participation, etc.

Benefits for the industry

- Advance the future of the investment advisory solutions industry
- Develop the next generation of industry leaders
- Foster collaboration and thought leadership to resolve industry issues

