

# Reach Your Leadership Potential

LEADERSHIP DEVELOPMENT FOR  
INVESTMENT ADVISORY PROFESSIONALS



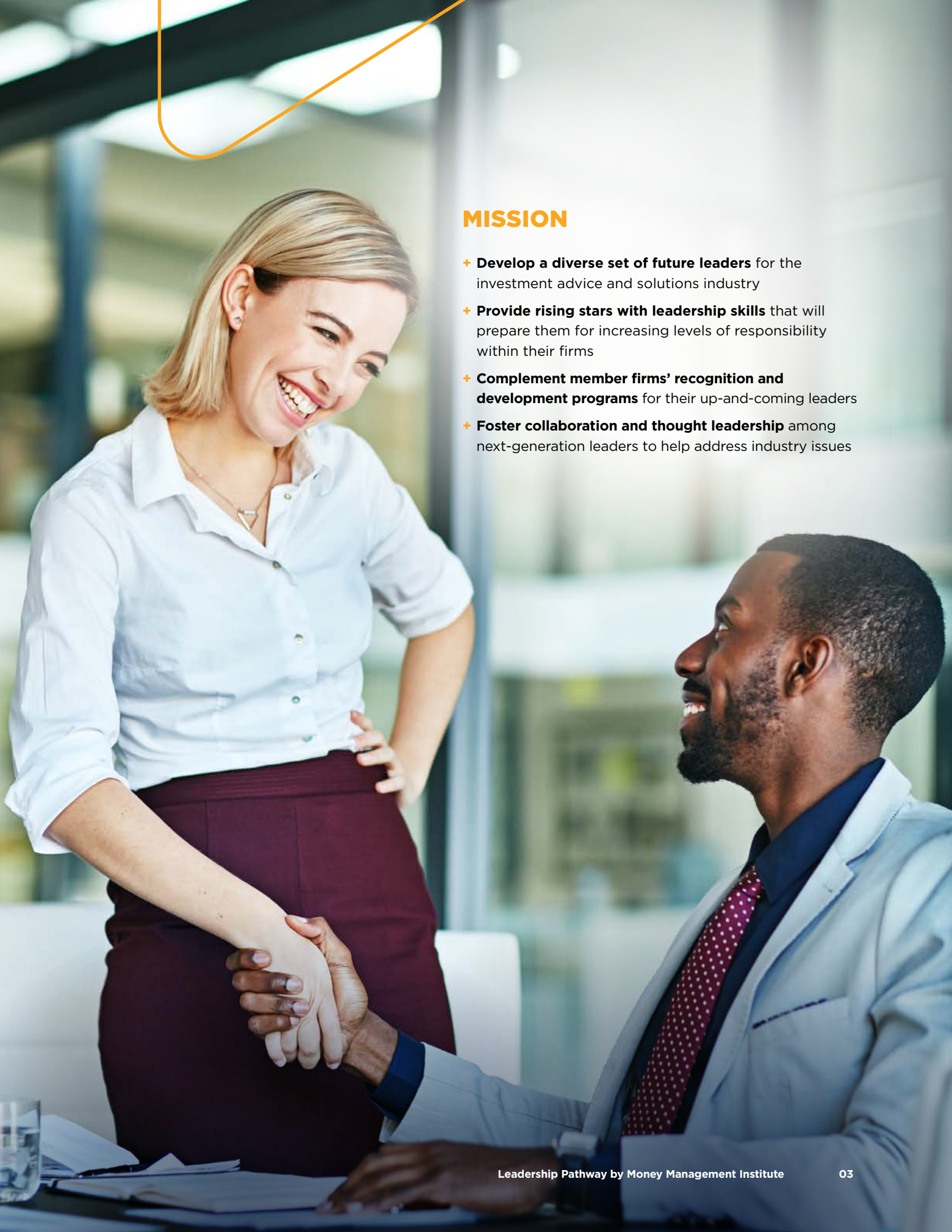


# About Leadership Pathway

**Leadership Pathway is a distinguished community and professional development program for selected investment advisory leaders with 5–10 years of industry experience. It promotes networking, collaboration, education, mentorship, and leadership. Members are respected emerging leaders within the industry and are looked upon to display initiative, take an active role in advancing their careers, and help address the important challenges that will shape the industry’s future.**

Prospective participants with 5–10 years of industry experience are nominated by their firms to participate in the two-year program.





## MISSION

- + **Develop a diverse set of future leaders** for the investment advice and solutions industry
- + **Provide rising stars with leadership skills** that will prepare them for increasing levels of responsibility within their firms
- + **Complement member firms' recognition and development programs** for their up-and-coming leaders
- + **Foster collaboration and thought leadership** among next-generation leaders to help address industry issues





## PROGRAM ACTIVITIES

- + **MMI conferences, forums, and webinars**  
(registration discounts available for participants)
- + **Special breakout sessions** and/or tracks at major conferences
- + **Community involvement**
- + **Mentor relationship**
- + **Further education and training** through an online soft skills curriculum, industry research, and special projects
- + **Planning and executing** the annual Leadership Pathway Seminar
- + **Networking events**



## CANDIDATE REQUIREMENTS

- + **Must have at least five years and up 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
- + **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

# Costs

- + \$750 one-time program fee
- + MMI conference registration costs
- + Travel expenses associated with attending MMI conferences



# Benefits

## PARTICIPANTS

- + **Increased professional and social interaction** across the MMI community
  - + First hand 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
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## PARTICIPANTS' FIRMS

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

- + **Advance the future** of the investment advice and solutions industry
- + **Develop the next generation** of industry leaders and increase the number of diverse leaders
- + Foster collaboration and thought leadership to **resolve industry issues**



# Contact Us

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