



Leadership Pathway

Leadership Pathway is a program designed to recognize and nurture the next generation of investment advice and solutions industry leaders through a structured curriculum of learning activities and networking opportunities. 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 NetMeetings (registration discounts available for participants)
- Special breakout sessions and/or tracks at major conferences
- Community involvement
- Mentor relationship with a senior-level industry professional
- 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 such as regional educational workshops

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 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

BENEFITS

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

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.

THE INDUSTRY

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

CONNECT, KNOW & GROW our next generation of investment advisory solutions leaders

Contact us at pathway@mminst.org or call **(646) 868-8500** for more information.

ABOUT THE MONEY MANAGEMENT INSTITUTE

Established in 1997, the Money Management Institute (MMI) is the industry association representing financial services firms that provide financial advice and investment advisory solutions to investors. Through conferences, educational resources, and thought leadership, MMI facilitates peer-to-peer connections, fosters industry knowledge and professionalism, and supports the development of the next generation of industry leadership. MMI member firms are dedicated to helping individual and institutional investors, at every level of assets, plan for and fulfill their financial goals.