



As the financial services industry contends with a combination of disruptive forces - innovations in technology, the emergence of new business models, and changing demographics - a positive correlation has been found between a firm's diversity and inclusion strategy and its financial performance. Therefore, there is a growing need for more diversity in the industry ... and Gateway to Leadership is here to help.

The Gateway to Leadership (GTL) Foundation, a 501c3 organization administered by the Money Management Institute, supports a variety of programs to foster career awareness and workforce readiness for students of color from historically underrepresented communities, particularly African Americans and Hispanics, seeking internships and entry-level employment opportunities in the financial services industry.

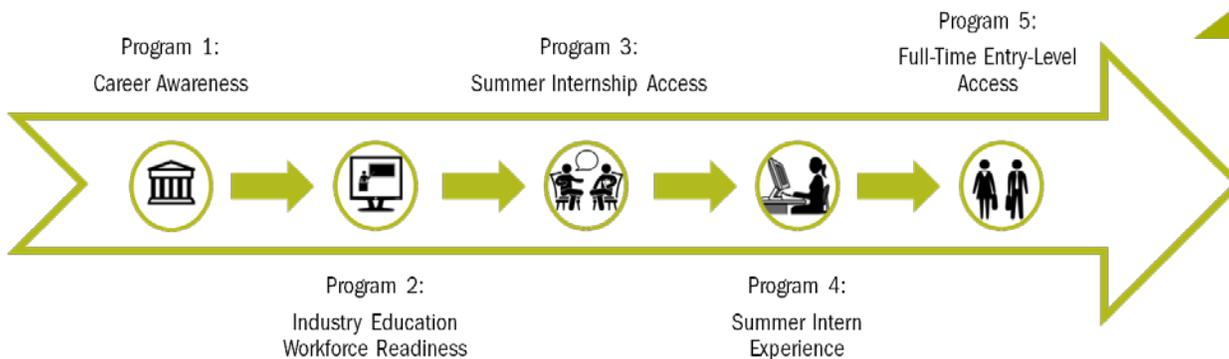
Gateway to LEADERSHIP

BY MONEY MANAGEMENT INSTITUTE

The primary goal of GTL is to provide MMI member firms - which collectively represent 95% of advisory solutions assets - an opportunity to improve their workplace diversity by providing access to a diverse pool of skilled and highly motivated future leaders.



THE FOUNDATION'S PROGRAMS



Programs 1-4 (Career Awareness, Industry Education, Summer Internship Access and Summer Intern Experience) are designed to better educate minority students about the financial services industry with the purpose of expanding and improving the candidate pool for full-time entry level positions at MMI member firms.

Program 5 (Full-Time Entry Level) will connect hiring firms with diverse, entry-level talent seeking full-time job opportunities. This program will evolve over time as more students participate in the Foundation's earlier programs and become top candidates for full-time, entry-level positions at MMI member firms.

FOUNDATION FUNDING

The five programs are supported by the Foundation's master fund, which depends on individual and institutional donations. If you and/or your firm are interested in contributing to the fund, please email gateway@mminst.org.

PROGRAM 1: CAREER AWARENESS

The Career Awareness program is GTL's first opportunity to familiarize college students with careers in financial services. GTL delivers a presentation, in-person or provided virtually, that introduces the idea of a career in financial services.

The presentation provides:

- A more focused explanation of the investment advisory solutions industry and the current industry landscape
- An outline of different career opportunities and roles within the investment advisory solutions industry



PROGRAM 2: INDUSTRY EDUCATION

Available through the MMI Continuous Learning Center, this **online education program** will offer different curriculums to students to further their education about the industry and prepare them for employment.

- Financial Services Introduction Curriculum
- Wealth Management Curriculum
- Investment Advisory Solutions Curriculum



Workforce Readiness

PROGRAM 3: SUMMER INTERNSHIP ACCESS

GTL introduces college juniors and seniors interested in internships to the investment advisory solutions industry and -- at the same time -- helps MMI member firms recruit diverse interns.

Candidate Identifying & Sourcing

GTL will identify and source qualified diverse candidates. Your firm will screen, interview and select the interns.



PROGRAM 4: SUMMER INTERN EXPERIENCE

All interns at MMI member firms are welcome in the MMI Summer Experience program to benefit from content and activities throughout their internship. The quality of the program's experience and the level of industry engagement are invaluable for students interested in furthering a career in our industry.

Career
Awareness

Industry
Education

Mentoring

Professional
Development

Resume
Assistance

Industry News &
Current Event
Discussions

Industry Insight
Calls

MMI
NetMeetings &
Resources

Networking

PROGRAM 5: FULL-TIME, ENTRY-LEVEL

The four preceding programs will generate a robust database for MMI members to source qualified, diverse, full-time, entry-level talent.

ABOUT MMI

Since 1997 MMI has been the leading voice for the global financial services organizations that provide financial advice and professionally-managed investment advisory solutions to individual and institutional investors. Through programs focused on member interaction, education and professional development, data analytics and insight, next-generation initiatives, and thought leadership and advocacy, MMI supports and advances the growth of a diverse spectrum of investment advisory solutions that serve an evolving worldwide financial landscape. MMI member organizations are committed to the highest standards of fiduciary responsibility and ethical conduct and to creating the most successful outcomes for investors at every level of assets. For more information, visit www.MMInst.org.

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