

Envestnet Institute On Campus:

Program Overview

The Talent Challenge

“Nearly half of surveyed financial services executives say that competition for global talent continues to be their most pressing concern.”

- Deloitte “Talent Edge 2020: Blueprints for the New Normal” survey



Addressing the Issue

- Providing a diverse talent pool of workforce-ready potential employees
- Bridging the gap between the theoretical and the practical
- Demonstrating current career possibilities
- Improving the perception of the industry

It's no secret that the asset and wealth management industry has a **TALENT CHALLENGE.**
We're addressing the issue.

Nearly half of surveyed financial services executives say that competition for global talent continues to be their most pressing concern.
Deloitte "Talent Edge 2020: Blueprint for the New Normal" Survey

We find college and university students with a curiosity for asset and wealth management and...

1. Teach them Provide foundational training on asset and wealth management through a self-paced eLearning environment. Teach industry acronyms and lingo. Show different career path opportunities within the industry.	2. Prepare them Fine tune the thought process towards graduation. Provide access to industry leaders through webcasts, videos, LinkedIn groups, and personal mentoring. Keep students up to date with industry advancements through additional materials including a complementary subscription to Handshake. Help students build a personal network. Help students find an internship.	3. Make them easy for employers to find Offer students the opportunity to participate in our Resume and Internship Hub, powered by DAK DIRECT. Vet students to provide industry with the best candidates. Act as a concierge between hiring managers and candidates.
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...to provide the industry with employees prepared to add value on day one of employment.

GOAL To train over 6,000 kids across 45-50 universities within five years.

HOW? Industry sponsorships allow us to offer 25 scholarships to participating universities each semester.

Take ownership of the future of our industry.
Visit www.investnetchipsoncampus.com to learn more.

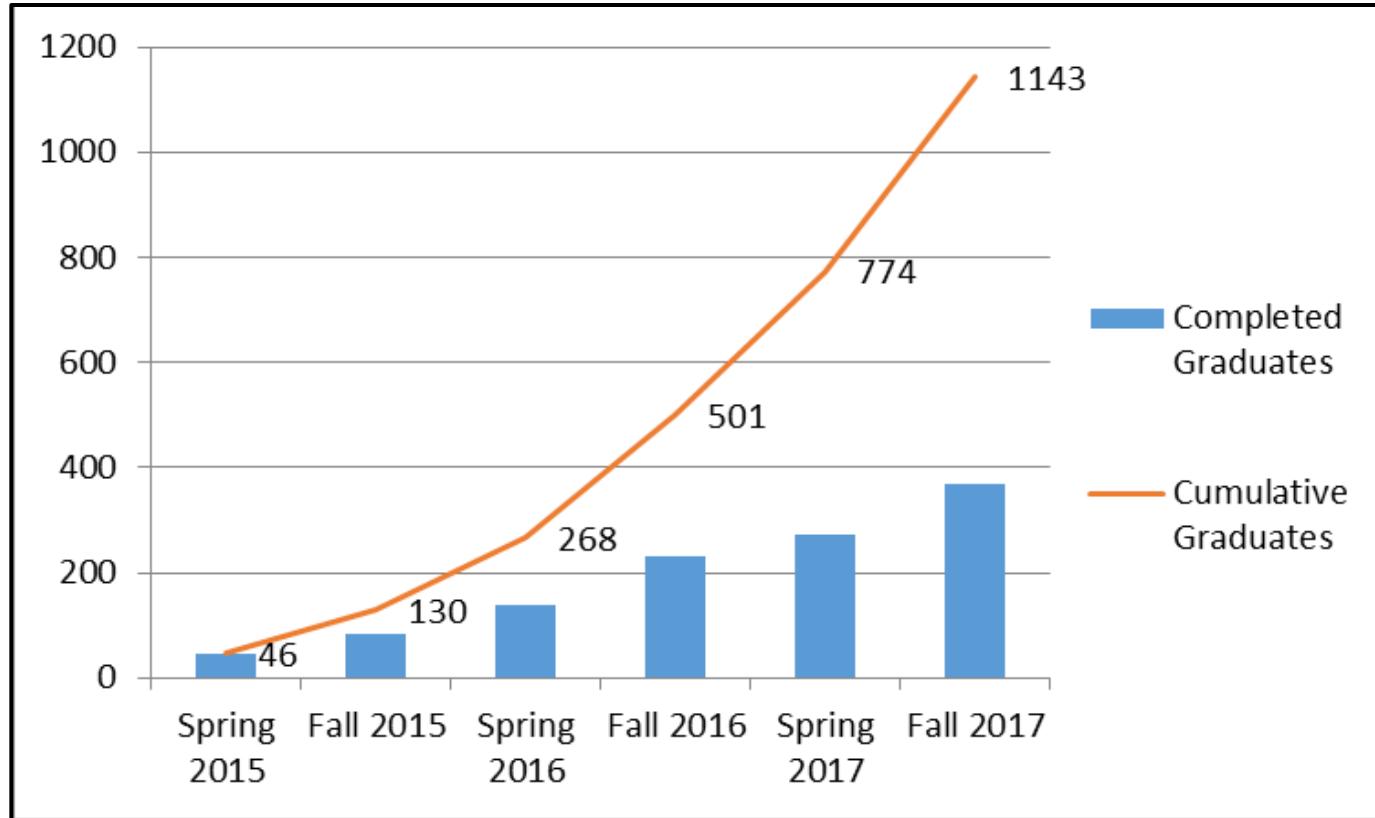
 **Investnet Institute**
On Campus

Highlights

- Industry sponsored
- No cost to students or universities
- Seven classes taught in a self-paced eLearning format
- Women In Wealth Initiative
- DAK Resume Hub



Program Growth



74%

**...of located graduates have
obtained jobs within the
financial services industry.**

Participating Universities



Includes:

- Bryant University
- Colgate University
- College of Charleston
- Delaware State University
- Elon University
- Fairfield University
- Fordham University
- High Point University
- Illinois State University
- Lake Forest College
- Mount Saint Mary's University
- Rowan University
- Rutgers University
- Tufts University
- University of Arizona
- University of Delaware
- University of Hartford
- University of Memphis
- University of New Hampshire
- University of North Carolina Wilmington
- University of Rhode Island
- University of San Diego
- Villanova University
- Widener University

Testimonials



“As a passionate student of the financial markets looking to expand my knowledge of the wealth management industry, I expected the program to only cover more technical terms as those I’ve been exposed to in finance courses and investment books; however, this was not the case.

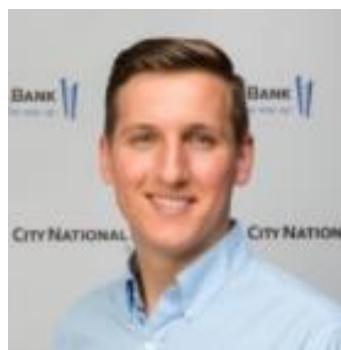
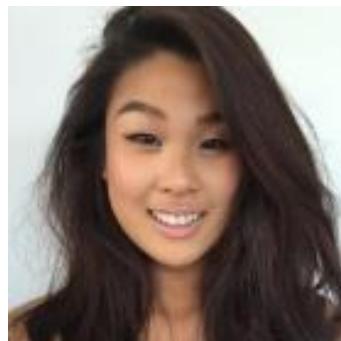
The Envestnet Institute on Campus offers a more abundant and wider preparation. The program itself was designed to be delivered in a very interactive way and captures essential vocabulary and terminology of the wealth management industry. It covers many useful terms, from investment strategies, client interaction and technology used in the subject to future trends that will impact the industry as a whole.

As I progressed through the courses, there were many eye-openers and “aha!” moments. It was very rewarding to finally be able to connect all the finance terms I’ve previously learned and grasp an idea of their actual implementation in the field. It is indeed practical knowledge.

Thank you for this great opportunity!”

- An EIOC Student Participant

The Faces of Envestnet Institute On Campus



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