



Envestnet Institute

On Campus

MID-YEAR REVIEW **2018**

2018 Mid-Year Review

Statistics since Inception (Spring 2015 through 6/30/2018):

- + 1,500+ students graduated from the program
- + 79% completion rate
- + 24 participating universities
- + 33% of participants are women
- + 34% of participants are minorities

2018 Progress to Date:

- + Added new major sponsor and board member (to be announced shortly)
- + Presented the first EIOC Vision awards
- + Multiple articles/press were published to promote industry awareness
- + Four additional universities committed for the fall
- + Women in Wealth Management
 - + 2018-2019 Women in Wealth Mentoring program launched with 20 participants
 - + *Leading Women's Summit* held at Fiserv's annual conference (800+ participants)
 - + *Women Leaders in Finance* event held at Investnet's Summit meeting (100+ participants)
 - + Participated in Bryant University's *Women in Finance Panel* as keynote address

8
T
O
N
E

2018 Mid-Year Review

Our Second-Half 2018 Goals:

- + End the year with over 2,000 students graduated from the program
- + Add 5 to 10 new geographically diverse universities
- + Add two-to-three additional major sponsors to the program
- + EIOC website redesign, inclusive of analytics
- + Measure the number of graduating students who acquire full-time jobs in our industry



Check out Fiserv's Cheryl Nash at the annual Bryant University Financial Services Forum:
[Women in Finance Panel](#)

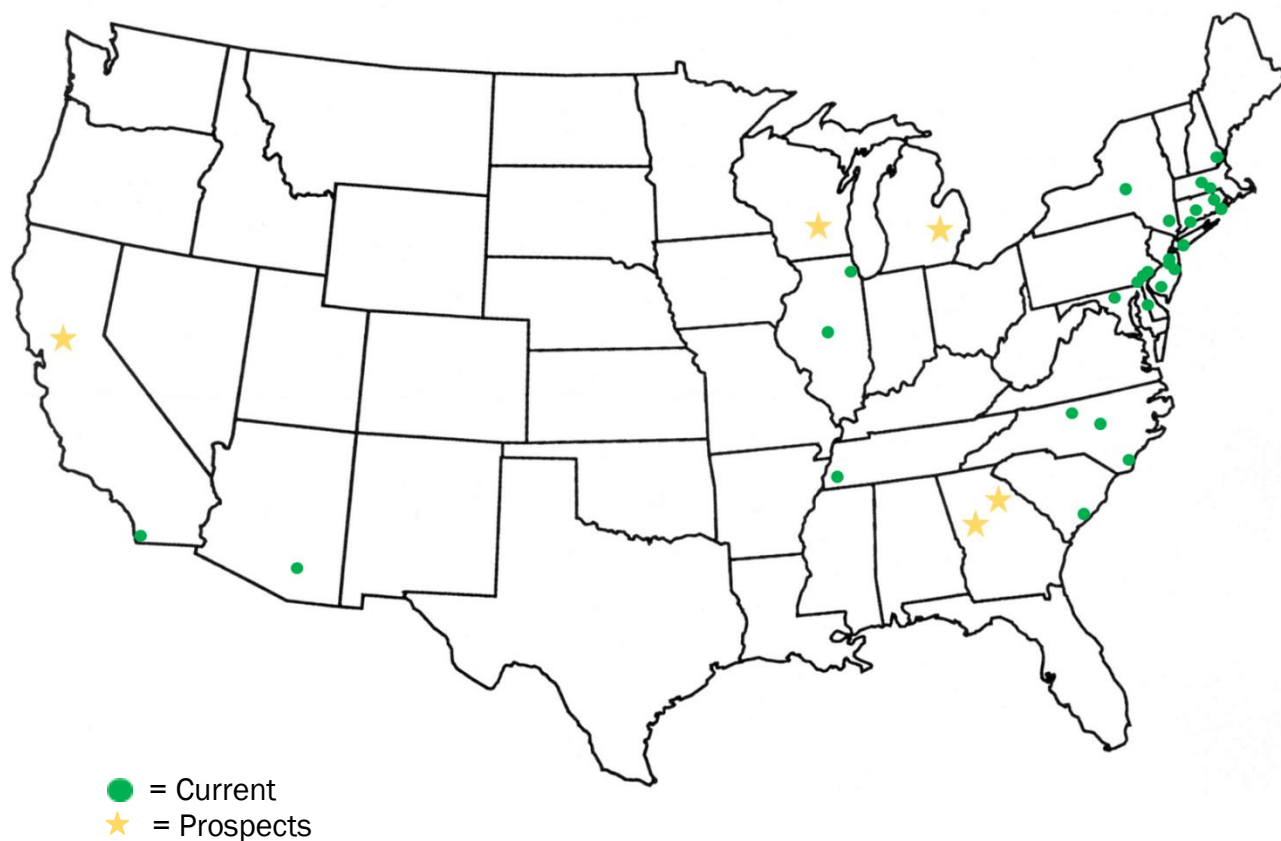


Take a look at this InvestmentNews [video](#) to learn how EIOC is preparing young talent for the wealth and asset management industry



2018 Mid-Year Review

Investnet Institute on Campus Participating and Prospective University Locations



Participating Universities

(28 universities as of June 30, 2018)

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

* Joining Fall 2018