

Investnet Institute On Campus Proves Success Translates to Job Placement: A Case Study



Hezekiah Ross was working towards a Master of Business Administration, Finance and Financial Management Services, at Bryant University in Smithfield, Rhode Island. Bryant was one of the initial universities to adopt the Investnet Institute On Campus program. Because Ross was a stand-out student, Professor of Finance Peter Nigro, Ph.D. awarded him the opportunity to take the Investnet Institute On Campus eLearning course, dedicated to exploring the wealth management industry.

On his experience participating in the program, Ross reported “Investnet Institute On Campus exposed me to concepts and terms that I was not initially aware of regarding the financial service industry. Moreover, it expounded on my existing knowledge of what it means to be a financial advisor and provided more insight on the meaning of fiduciary responsibility. As I navigated through the seven classes and exams, I felt as though I was on a well-choreographed expedition, exploring the ins and outs of the financial investment and advisory industry.”

Once Hezekiah completed the course and received his certificate, he availed himself of the Investnet Institute On Campus Resume and Internship Hub, powered by DAK Associates, an executive search and consulting firm that exclusively serves the financial services community. He completed an extensive profile, highlighting his strengths, interests and natural capabilities. From there, DAK was able to launch an efficient job search process.

A successful match was made with Associated Investor Services, Inc.

Paul Vladem, President of Associated Investor Services, Inc., a Registered Investment Advisory firm, is one of the registered investment advisors utilizing the hub as a way to find qualified exceptional talent. As one of the industry executives battling the talent gap, Vladem states, “Within the industry, there is an immense need for young talent. At Associated Group, we weren’t looking to expand with simply someone in the market for a job. We wanted a candidate with upward mobility, a business background, and with the desire and knowledge of the industry.” Vladem and his team found it difficult to identify a go-getter who was willing to go above and beyond to differentiate his or herself and turned to DAKdirect to aid in their search process. “When we utilized DAK, especially paired with those students who completed the Investnet Institute On Campus course, the quality of candidates, and even their resumes, were easily recognized,” Vladem shared. In this case, Hezekiah Ross proved to be the go-getter that Associated Group was looking for.

Ross began his journey with Associated Investor Services in late 2017. He wasn’t the only one excited about his future with the firm. Vladem was eager to see what Ross could bring to his team. “After completing the Investnet Institute On Campus course, Hezekiah showed he was willing to make that extra commitment and had the drive. He displayed the willingness to grow within the

industry rather than just finding a job.” Vladem added, “the course guides the transitions from schooling to the real world.” With his training and drive, Ross was confident that he could add value from the first day of employment and continues to keep in touch with the team at Envestnet Institute On Campus as he makes his mark in the financial services industry.

Update, in his own words. One Year Later. 1 May 2019.

My first year with Associated Investor Services was extremely challenging. Between the transition from Rhode Island to South Florida with no certifications or license and overcoming the overarching learning gap of the industry, I certainly had my work cut out for me. However, gradually over time and with the help of my colleagues, I was able to reduce that gap significantly earning both the series 7 and 66 license, developing a level of comfort and making my daily efforts more productive. As I support my team, actively participating in the analysis and evaluations of our clients' portfolios and investments, I'm more confident now than ever before.

Looking forward, I am on track to begin interacting with some of our current clients as a direct contact for their financial needs. Additionally, I have the opportunity to develop business and provide advisory services as I continue to expand my knowledge and understanding of the industry.

Learn More:

Envestnet Institute On Campus

www.envestnetinstituteoncampus.com

Contact: **Katy Yenawine** at katy.yenawine@investnet.com for your personal consultation

DAKdirect Job Placement and Internship Hub

www.dakassociates.com

Contact: **Ashley Bang** at abang@gstoneinc.com or **Steve Clark** at sclark@dakassociates.com for your personal consultation

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