Envestnet Institute
On Campus

Program Description

The Envestnet Institute on Campus offers an educational program geared toward college and graduate-level students seeking a career in wealth management. Selected students gain in-depth training through an eLearning program with content from leaders in the financial services industry. Students will benefit from relevant, broad-based, practical training on the Wealth and Asset Management industry. The program is made possible through a collaboration between Envestnet, Fiserv, Jackson National Life, Fidelity Clearing & Custody Solutions® and DAKdirect.

Program Highlights

- Up to 25 students per university, per semester
- Program offered fall and spring semesters
- No cost to the institution or the student
- Students chosen at the university's discretion
- Content reviewed and approved by Money Management Institute
- Self-paced eLearning format
- Understanding of the ever-changing products, technologies and of the current global landscape of the business
- Inform you of the current job possibilities within the industry and the tools needed to allow you to converse intelligently and interview effectively
- Set you apart from your peers and give you an edge when seeking a job.
- Certification of completion awarded to graduates

Curriculum

- Approximately 7 hours of coursework that includes; 7 mandatory classes and corresponding tests
- Student Toolkit and webinars
- Resume/Internship Hub
- Women In Wealth Management initiative
- Complimentary FundFire subscription

Course Descriptions

Course: *Envestnet Institute on Campus: A Complete Understanding of Managed Investment Solutions*

Classes:

- EIOC-100: Introduction to the Investment Advisory Industry
- EIOC-101: Basics of Investing
- EIOC-102: The Evolution of Managed Investment Solutions Industry
- EIOC-200: Advisor Sales Process and Client Interview
- EIOC-201: Baby Boomer Investing
- EIOC-202: Technology to Service and Support Managed Solutions
- EIOC-203: The Unified Managed Household and What it means to the Financial Advisory Business

Fall 2019 Schedule

- **Friday, September 20th** - List of names due to Katy Yenawine
- **Monday, September 23rd** - Student Welcome email sent and webinar registration
- **Thursday, September 26th at 6:00 pm (EST)** - Kickoff Webinar (will be recorded)
- **Friday, November 15th** - Program ends. All classes and test should be completed
- **Friday, November 29th** - Certificates issued to all students that have met requirements

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