

## Program Description

The Investnet 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 Investnet, Fidelity Investments, and BlackRock, Inc.

## 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.
- Badge 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:** *Investnet 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 2020 Schedule

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|---|---|
| • <b>Friday, September 18</b>                   | List of names and emails due to <a href="#">Katy Yocom</a>            |
| • <b>Monday, September 21</b>                   | Student Welcome email sent and webinar registration                   |
| • <b>Tuesday, September 22 at 6:00 pm (EST)</b> | Kickoff Webinar (will be recorded)                                    |
| • <b>Friday, November 20</b>                    | Program ends. All classes and test should be completed                |
| • <b>Throughout</b>                             | Badge of completion issued to all students that have met requirements |

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