

Diversitas

The financial planning profession, and the related financial services industry, is thriving in so many ways, but it lags in the diversity of its professionals. This symposium will bring together four key groups – the new generation of financial planners, career influencers, current industry leaders and thought leaders in diversity – to explore ways to attract more women and people with diverse backgrounds into the field.

The goal is to create a multiplying effect among the career influencers in the recruitment of the next generation of professionals entering the industry.

Consider becoming a sponsor for this event and support this important cause.

Contact Information For Sponsorships

Diversitas
Thursday, Nov. 21, 2019

University of Akron Campus,
Student Union

Registration: 7:30 a.m.
Program: 8 a.m. to 1:30 p.m.

Visit diversitas.uakron.edu
for more details and to register.

#diversitasUA | #Uakron

Key Players for Change

1. **The new generation of financial professionals** are key to clarifying the understanding of their needs and desires and how those needs and desires can be met through employment in the industry.
2. **Current wealth management industry leaders** are key to creating an environment that will be attractive to a more diverse population of financial planners, including challenging the existing culture to be more open to diversity.
3. **Thought leaders** in the area of diversity, both in the wealth management industry and society in general, will define the importance of this needed change, conduct and share their research on the topic, and bring best practices to these efforts from across a broad range of industries and society. These thought leaders are from the local, regional, and national levels.
4. **Career Influencers**, through their own understanding and career advice, are key to introducing the next generation to the importance of the wealth management industry and why the profession is a good fit for the student or career changer. This includes anyone who is asked, formally or informally, for career advice, including teachers, guidance counselors, secondary school administrators, college academic advisors and more.

Lead Founding Sponsor



Investment
Management

The University of Akron is an Equal Education and Employment Institution - uakron.edu/eeo
© 2019 by The University of Akron / BA-0119-34325



The University of Akron
College of Business Administration

diversitas

Expanding Diversity in Wealth Management



Expanding Diversity and Inclusion in Financial Planning and Wealth Management

Thursday, Nov. 21, 2019
The University of Akron Campus,
Student Union

SPONSORSHIP GUIDE

Focus of Diversitas

With major sponsorship funding from Charles Schwab Investment Management, the symposium will identify, create, and disseminate best practices for recruiting a diverse population of college-bound students and career changers into the financial planning profession and the related financial services, with an initial focus on Northeast Ohio.

The symposium will target two groups important to improving overall diversity in the financial planning industry:

- **“Career Influencers”** who, both formally and informally, advise and encourage students and career changers on their career choices. This group includes high school guidance counselors, teachers, administrators, college academic advisors, outplacement counselors and youth organization leaders, among others.
- **“Financial Advisors”** who populate the various roles within the financial planning profession and the related financial services and are the best source of information about the career and its attributes that make it a great choice for women and people with diverse backgrounds.

Why This Is Important

The financial services industry is currently lacking in gender and overall diversity. According to Census Bureau estimates from 2010 and reported in Financial Planning Magazine in 2014:

- Women comprise only 16 percent of all financial advisors and 23 percent of CFP® certificants vs. 51.5 percent in the U.S. Population.
- Whites make up 80.3 percent of the advisor population versus 64.7 percent of the general population

Census data indicate that African Americans and Hispanics are both greatly underrepresented in the advisor ranks, and generally in the financial services industry, as compared to the general population.

A number of firms are focusing on improving diversity in their ranks with initiatives to address the issue.

Sponsor Categories (with included benefits)

Lead Founding Sponsor – Charles Schwab Investment Management

- Prominent listing on website with logo on all marketing materials
- Primary placement of personnel in speaker or panelist roles as appropriate
- Two named tables with 16 employee/ guest tickets
- 30 influencer tickets*

Lead Sponsor - \$10,000

- Prominent listing on website with logo, in program, and on-site marketing materials
- Placement of personnel in speaker or panelist roles as appropriate
- Two named tables with 16 employee/ guest tickets
- 30 influencer tickets*

Platinum – \$5,000

- Listing on website with logo, in program, and on-site marketing materials
- Placement of personnel in speaker or panelist roles as appropriate
- One named table with eight (8) employee/ guest tickets
- 20 influencer tickets*

Gold – \$2,500

- Listing on website, includes logo only in program and on-site marketing materials
- One named table with eight (8) employee/ guest tickets
- 10 influencer tickets*

Silver – \$1,500

- Listing on website, includes logo only in program and on-site marketing materials
- One named table with eight (8) employee/ guest tickets
- Five (5) influencer tickets*

Table Sponsor – \$500

- Listing on website, includes logo only in program and on-site marketing materials
- One named table with four (4) employee/ guest tickets
- Two (2) influencer tickets*

Ticket Sponsor – \$100

- One (1) advisor and Two (2) influencer tickets*

Individual Advisor Ticket – \$35

- One (1) advisor admission to the event

***Influencer Ticket** is a sponsored ticket assigned to each influencer.

- Sponsor logo printed on the name badge of their sponsored influencer.
- Sponsors are encouraged to identify and invite influencers.
 - We will provide marketing materials.
- Any tickets not given directly by the sponsor will be assigned by the organizers.

