



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 standout 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 services 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 took advantage 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.

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 help discover qualified 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* program, 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.

During the job search process, Ross worked directly with Steve Clark, president of DAK Associates to ensure he was paired with the right company for him. He and his DAK representative, Jordyn Rosen, established a mutual connection during their initial phone conversation. Ross noted that “Jordyn made me feel as if my satisfaction and job placement was just as high on her priority list as it was on my own.”

Ross is set to begin his journey with Associated Investor Services in the near future, and he isn’t the only one excited about his future with the firm. Vladem is eager to see what Ross can 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 is confident that he will be poised to add value from the first day of employment and looks forward to keeping in touch with the team at *Investnet Institute On Campus* as he begins his foray into the financial services industry.



Envestnet Institute

On Campus

About the Program

Envestnet Institute On Campus aims to build a bridge between colleges/universities and investment management by training talented young individuals and positioning them for employment across various areas of the industry. Our goal is to train 5,000 students from multiple academic institutions across the United States over the next five years. Students will benefit from relevant, broad-based, practical training on investment management. The program is made possible through a collaboration between Envestnet, Fiserv, Money Management Institute (MMI) and DAKdirect.