



FINANCIAL WOMEN'S ASSOCIATION

EDUCATIONAL PROGRAMS

Giving back to the community

The Financial Women's Association was established in 1956 to address key needs in the financial workforce by bringing together high achieving professionals from every sector of the financial world. We are dedicated to developing future leaders, enhancing the role of women in business, investing in the community, and increasing the pipeline of diverse candidates. The FWA has contributed to our community by providing scholarships, mentoring programs, financial literacy workshops, and community service activities, reaching over 5,000 individuals over the past 30 years.

High School Mentoring Program

In one of the longest running New York City School partnerships, the FWA matches member mentors to students at Murry Bergtraum High School. Serving approximately 30 high-potential inner-city girls each year, mentees join the program as sophomores and continue through graduation, focusing on personal and academic development and college preparation. Some program highlights include:

- One-on-one mentoring
- SAT and PSAT preparation classes
- Financial aid workshops
- Career discussions
- Overnight college visits
- Community service projects

Last year, 100% of the mentees graduated high school and enrolled in college. This program is made possible through grants from the U.S. Bank Foundation and National Mah Jongg League Foundation.

Scholarships for High School Mentoring Graduates

The FWA awards scholarships to eligible graduates from the FWA Murry Bergtraum High School Mentoring Program to assist with their undergraduate studies. More than 150 students have received over \$600,000 in scholarships over the past 30 years. Funds received through the BMO Capital Markets Equity Through Education program have allowed the FWA to offer these scholarships.

Undergraduate College Mentoring Program

The FWA Baruch College Mentoring Program matches FWA mentors with undergraduate business students, providing one-on-one mentoring focused on career and personal development. Mentees participate in a variety of programs such as special breakfasts at top companies, workshops on self-promotion and networking, and lunches with speakers who share advice about their successful careers. Students are also exposed to recruitment opportunities at major financial institutions such as UBS and Morgan Stanley. The various components of the program are all funded by BMO as follows:

- **Student Awards** – A \$1500 award is offered to each mentee in their junior and senior years, and serves as a significant contribution to their financial well-being during college.
- **Study Abroad** – Since 2013, mentees from Baruch have studied abroad with scholarships made possible by FWA's partnership with BMO. Approximately six students have participated in this special opportunity for academic and cultural enrichment each year since 2013.
- **Leadership and Professional Development Conference** – Each spring, mentees attend leadership conferences at Simmons College in Boston and the University of Maryland at College Park. These conferences provide opportunities for students to learn from intensive workshops, keynote speakers, and networking sessions with peers.

- **Tools for Clear Speech** – This Baruch College program provides students with a variety of resources dedicated to providing clear speech and speaking intelligibility instruction to students for whom English is a second language. The FWA contributes a small portion of the funding for this program. Since 2013, approximately 500 students have participated in this program each year, including a few FWA Baruch mentees.
- **FWA Scholars Community Online** – This LinkedIn group engages all past and current students and mentors alike, allowing them to stay connected throughout their career development process and on their professional journeys.

FWA/BMO Capital Markets Scholars Fund at Baruch College

Thanks to significant support from BMO Capital Markets, the FWA has endowed needs-based scholarships of \$5,000 to six students each year since 2006. Over 40 young women have received support through this funding since its inception.

Graduate Scholarships

Over the course of 30 years, the FWA has awarded more than \$830,000 in MBA scholarships to over 150 students. Today, \$10,000 in funding is made available each year to NYU, Columbia, Fordham, and Baruch, for supporting speakers, programs and events. In 2013, BMO Capital Markets became the underwriter of this program.

Wall Street Exchange

In partnership with our President's Circle companies and other corporations, the FWA's Wall Street Exchange (WSE) program offers an eight-week professional development series to rising college seniors with summer internships in the financial industry. WSE provides an exciting opportunity for participants to enhance job skills while learning to think strategically about career choices. Since 1975, FWA corporate partners have hosted these workshops and have even hired some of the 1,000-plus WSE participants.

Financial Literacy for Adults and Teens

In 2001, the FWA began offering financial literacy workshops to high school students through the Financial Backpack program, where participating students learn practical personal financial skills, such as budgeting, investing, and planning for college. In 2008, HSBC granted \$900,000 to the FWA to expand the program's breadth and depth. Over 2,600 students have participated in this program.

FWA members have also been teaching financial literacy skills to adult clients with very minimal financial backgrounds since 2004. The seven-week courses are currently offered through Nontraditional Employment for Women (NEW) and the Grace Institute. Over 230 women have completed the program since its inception.

Microfinance and Impact Investing

In the shared spirit of women helping women and through the hard work of the late FWA president Lenore C. Albom, the FWA explores microfinance issues and raise funds to support microfinance organizations through the Lenore Albom Microfinance Giving Initiative. Over the past eight years, more than \$60,000 has been raised and distributed through NGO partners in Lenore's memory.

Educational Programs for the General Business Community

Programs focused on education and professional development are designed to provide continued learning and career growth to all members and guests of the FWA. A variety of events are sponsored throughout the year by several committees, including Professional Development, Not-for-Profit, Entrepreneurs, and Impact Investing.