

STREAM



Strengthening Race and Equity in Asset Management

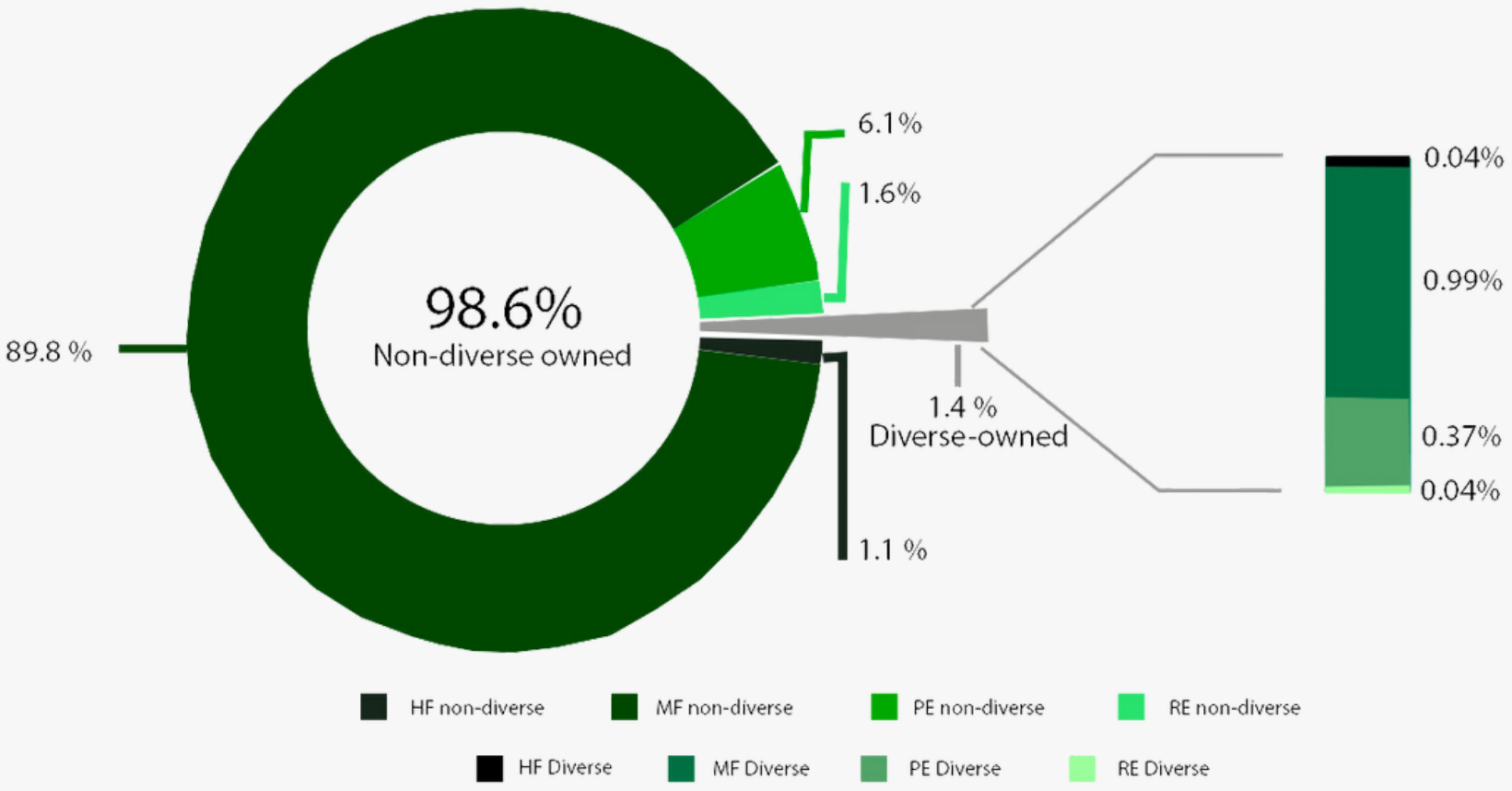
PARTNER | DONOR | SPONSOR

OUR MISSION

STREAM's mission is to educate, train, mentor and provide scholarship and internship opportunities to college students from underrepresented groups in the area of asset management, with the ultimate goal of increasing industry representation.

INDUSTRY ISSUE

Breakdown of study sample firm AUM by asset class.



Source | Knight Foundation



PROGRAMMING



EDUCATION



MENTORSHIP



NETWORKING



CAREER SUPPORT

Early Reach Program

HIGH SCHOOL STOCK COMPETITION



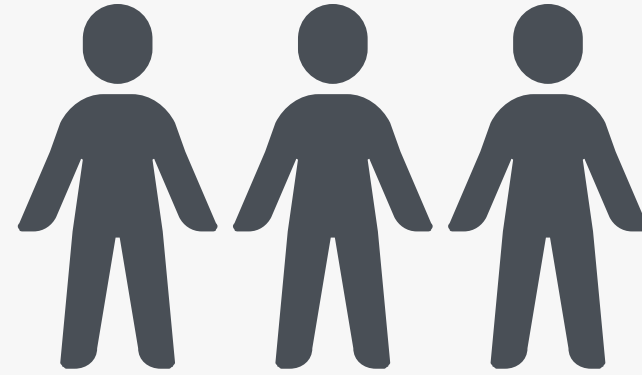
Over **150+** students participate in live market trading with \$1M in "funds" and the top 20 finishers from the group are awarded **\$500** Fidelity Youth Accounts.

OUTCOMES

2021 - 2023



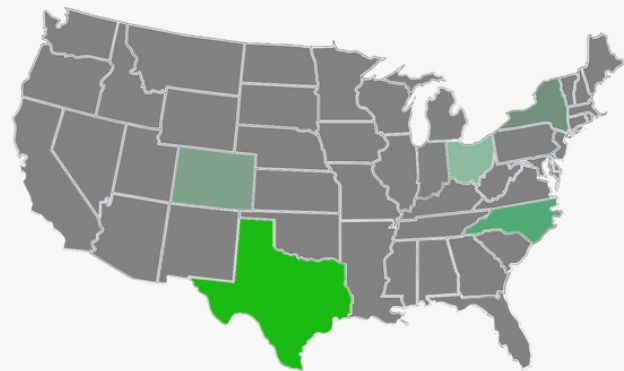
STUDENT APPLICANTS FROM **212**
COLLEGES AND UNIVERSITIES



Over **2,000** APPLICANTS
SINCE 2021



SCHOLAR COMPLETION RATE



PLACED IN **5** STATES



APPLICATIONS HAVE
INCREASED BY **250%**



ALUMNI PLACEMENT RATE

As of the end of summer 2023, STREAM has provided a total of 61 internships and \$610,000 in scholarships and compensation.

GET INVOLVED

We've all seen the Diversity, Equity, and Inclusion mandates, and while those goals are incredibly important and need to be set, a lot of managers are thinking, how will we get there?

Your support helps to create this change one student at a time, sustain the mission, and is used in direct service to our scholars.



PARTNER

Host an intern.

DONATE

Support the cause.

VOLUNTEER

Offer time, knowledge and skills.

COLLABORATE

Additional ways to provide support.

STREAM INTERN OVERVIEW

1

Candidates are recruited from schools across the country through career fairs, on-campus visits, Handshake, and coffee chats.

2

Each applicant must answer several essay questions about how being a part of an underrepresented group has impacted them and what this opportunity would mean.

3

Resumes, essays, and transcripts are reviewed by a team of volunteers that work in the finance industry.

4

Students are interviewed by volunteers from STREAM and coached based on their strengths and weaknesses.

5

All interns are provided with a 2-year license to Wall Street Prep and are encouraged to start learning prior to their first day.

6

Our scholars are paired with a mentor (established industry professional) and a student liaison (young industry professional) to guide them.

7

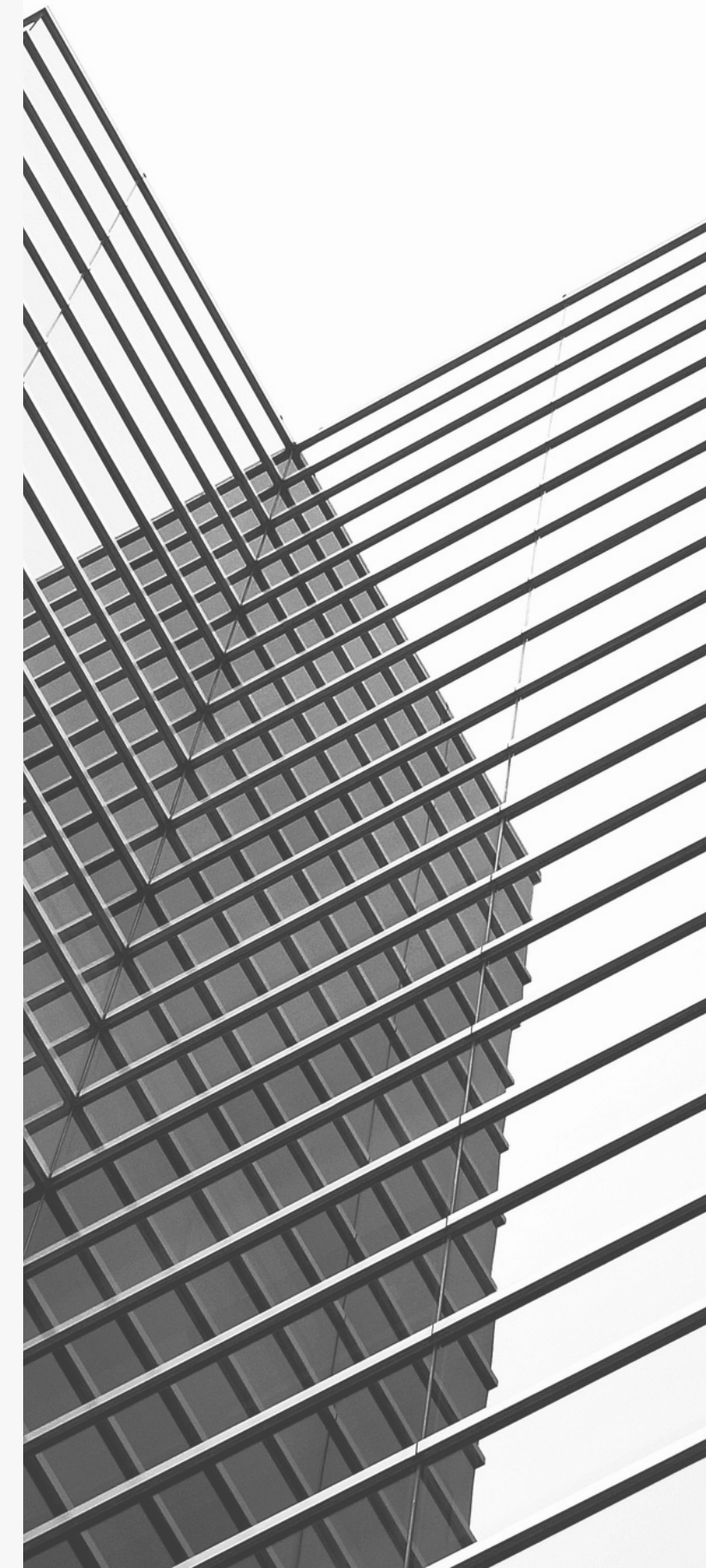
We provide educational content prior to, during, and post-internship.

8

Our alumni remain active as volunteers and are given ongoing mentoring and career support.

PARTNERSHIP OVERVIEW

- The internship time period is June-August, but it can be flexible if requested in advance.
- We ask that you guarantee a spot for a STREAM intern because we believe we can exceed talent expectations.
- We ask that you sign an MOU outlining expectations.
- There is a total commitment to the student through the program of \$12,500.
- The initial round of interviews with three+ candidates on a scheduled super day.
- A STREAM Scholar series of educational content will be offered weekly, and we ask that you encourage interns to attend. *This content is also available to other interns at your firm who are not involved in the program.*
- We offer volunteer opportunities to invite your team to get involved.
- We will provide language to incorporate into your DEI policy if needed.



ANNUAL EVENTS

Meet and Greet

An event at the beginning of the internship for the scholars, partners, and supporters to connect and network.



Scholar Series

Each week of the internship, we have speakers from across specialties that share different aspects of the industry with our scholars.



Closing Ceremony

An event at the end of the internship for the scholars, partners, and supporters with a recap and report out on the program.



Summit

A yearly conference with speakers that share their experience and knowledge with a job fair following the educational content.



VOLUNTEER OPPORTUNITIES

STREAM has an ongoing need for people that want to give back to the next generation of diverse talent.

Examples of ways to volunteer are listed but if you have an idea of how you might be able to utilize your unique skill set, we are open to new ideas.

Mentor | Student Liaison

Provide guidance to an intern as they navigate the industry and internship experience.

Application Review

Assist in ranking candidates based on resume, essay questions, and transcript.

Fundraising

Planning and outreach as we work toward growing our assets to make a larger impact.

Speak at Event

Offer your insight and experience to teach the student scholars.



FINANCIAL SUPPORT

Partner | Donor | Sponsor

*Please let us know if you would like to contribute in a different way than listed, we are happy to work something out!

PARTNER

LEADING PARTNER \$35,000

- Host two interns
- Round one priority assignment of interns for interviews
- An additional 20% contribution to intern travel/housing/resources
- Invitation to Meet and Greet and Closing Ceremony for ten; first selection on event sponsorship opportunities
- Recognition by level on the website (with link to website) for one year, all social media platforms, and semiannual communications

SUSTAINING PARTNER \$25,000

- Host two interns
- Round two assignment of interns for interviews
- Invitation to Meet and Greet and Closing Ceremony for eight
- Recognition by level on the website (with link to website) for one year, all social media platforms, and semiannual communications

SUPPORTING PARTNER \$15,000

- Host one intern
- An additional 20% contribution to intern travel/housing/resources
- Invitation to all events for five
- Recognition by level on the website (with link to website) for one year and all social media platforms

CONTRIBUTING PARTNER \$12,500

- Host one intern
- Invitation to all events for two
- Recognition by level on the website (with link to website) for one year and all social media platforms



DONOR

LEADING DONOR \$50,000

- Highlighted as a Leading Donor of STREAM on all platforms and communications
- Contribution to supporting interns for diverse asset management firms (100%)
- Recognition by level on the website for one year (with link to website), all social media platforms, and quarterly communications
- Access to all events for ten
- Speaker spotlight at the Meet and Greet and Closing Ceremony

SUSTAINING DONOR \$25,000

- Recognition by level on the website for one year (with link to website), all social media platforms, and quarterly communications
- Contribution to supporting interns for diverse asset management firms (75%)
- Access to all events for eight

SUPPORTING DONOR \$15,000

- Recognition by level on the website for one year (with link to website), all social media platforms
- Contribution to supporting interns for diverse asset management firms (30%)
- Access to two events for five

CONTRIBUTING DONOR \$10,000

- Recognition by level on the website for one year (with link to website)
- Contribution to supporting interns for diverse asset management firms (10%)
- Access to one event for five people



SPONSOR

LEADING SPONSOR \$25,000

- Meet and Greet with STREAM scholars prior to the event
- Firm representative to speak on DEI programming within the firm
- Ten guests invited to the sponsored event
- Recognition at this level at the sponsored event
- Recognition on invitations, website (with link to website), quarterly communications, and event promotions via all social media platforms

SUSTAINING SPONSOR \$15,000

- Eight guests invited to the sponsored event
- Recognition at this level at the sponsored event
- Recognition on invitation, website (with link to website), quarterly communications leading up to the event, and event promotions via all social media platforms

SUPPORTING SPONSOR \$10,000

- Five guests to the sponsored event
- Recognition at this level at the sponsored event
- Recognition on website (with link to website) and event promotions via all social media platforms

CONTRIBUTING SPONSOR \$5,000

- Two guests to the sponsored event
- Recognition by level at the sponsored event
- Recognition on website (with link to website)



At STREAM, we think our model is an excellent start to taking actionable steps toward allyship in the asset management industry, and we believe we are creating a diverse pipeline to bridge this enormous gap.

GET IN TOUCH WITH US

WEBSITE

thestreamfoundation.org

E-MAIL

info@thestreamfoundation.org