



2025

Annual

Report



**February
2026**

Prepared by
**Victoria O'Tool,
Executive
Director**

Prepared for
**FinServ
Foundation**

Table of Content

President's Annual Letter	01 & 02
Executive Director's Letter	03
A Year's Overview	04
First Cohort Update	05
Conference Attendance Overview	06 - 08
Coaching Overview	09 & 10
Mentorship Overview	11 & 12
Awards Won	13
Numbers to Note	14
Financial Highlights	15
Fellow Highlights	16
Volunteer Staff Highlights	17
New Additions to the Team	18 - 20
Future Initiatives	21
Sponsors & Partners	22
Thank You	23

PRESIDENT'S ANNUAL LETTER



Dear FinServ Foundation Community,

At FinServ Foundation, our mission has always been clear: to develop the next generation of financial services leaders into the most capable, connected, and prepared generation our industry has ever seen. We believe talent is not the problem. Opportunity, access, and development are. When we invest intentionally in mentorship, coaching, and community, we unlock potential that transforms careers, firms, and ultimately the future of the financial services industry.

That belief guided everything we did in 2025.

This past year was one of the most impactful and energizing in FinServ Foundation's history. We supported and inspired hundreds of students and young professionals through our Fellowship Program, mentorship network, events, and coaching initiatives. We welcomed applicants from ten new partner universities and colleges, expanding both the diversity and reach of our pipeline. As a result, our community now spans more than 50 institutions, a milestone that reflects both growth and trust in our mission.

At the heart of this success is our team. FinServ Foundation is powered by volunteers, mentors, and leaders who generously give their time, insight, and belief in what is possible. In 2025, we added dozens of new mentors and welcomed outstanding new advisory board members and staff, including Julien Franklin of Bryn Mawr Trust, Dr. Terrance Martin, and Dr. Effie Antonoudi. We were also thrilled to welcome Victoria O'Tool as our Executive Director and Samantha Allen, EVP of Marketing at Merit, as our Head of Mentorship. Their leadership, vision, and execution have elevated our impact and strengthened our foundation for the future.

We also launched a Fellow Advisory Board in 2025, featuring an impressive group of former FinServ Fellows. This brings a great group of young professionals back into the organization to develop and help drive forward the mission. We also launched a group of FinServ fellows who assist with our conference events and join fellows at the events.

We also deepened and expanded our partnerships in meaningful ways. In 2025, we added incredible strategic partners, including eMoney, WisdomTree, Finance of America, FIG, FP Transitions, WealthAccess, Endeavor Retirement, Holistiplan, AssetMap, Wealth.com, and many others. These partnerships are more than logos on a page. They represent shared values and a collective commitment to developing talent the right way. Together, we are building bridges between education and industry, theory and practice, ambition and opportunity.

PRESIDENT'S ANNUAL LETTER

2025 was also our strongest fundraising year to date. We welcomed more new corporate sponsors and individual donors than ever before, a clear signal that the industry recognizes the urgency of the talent challenge and believes in FinServ Foundation as part of the solution. Every dollar raised directly supports students, mentors, programming, and access, and we are deeply grateful for that trust and support.

Mentorship continues to be the engine that drives real outcomes. This year, Fellows secured placements and roles at firms such as Schwab, Bryn Mawr Trust, eMoney, Vanguard, Chase, PNC, and many others. One particularly inspiring story is a recent graduate from the class of May 2025 who has already launched his own firm in Texas. These are the stories that remind us why this work matters. They change lives, strengthen firms, and elevate our entire profession.

Looking ahead to 2026, our focus is on depth, scale, and sustainability. We aim to grow donations by approximately 30 percent while continuing to strengthen our partnerships. We plan to onboard 50 to 100 new mentors, expand our Fellowship to approximately 200 Fellows, and attend 7 to 8 key conferences to broaden our reach. Rather than expanding to many new universities, we will focus on deepening impact across our existing network of 50 plus institutions.

We are also working to transform our coaching sessions into a scalable, self-study certificate program for new advisor development, making high-quality training accessible to even more aspiring professionals. Our podcast will continue to grow, bringing in new voices and conversations centered on leadership, development, and the future of financial services.

Talent remains one of the top concerns across wealth management today. The next generation is the strongest and most capable yet, but they need guidance, support, and belief. Long term, I am committed to a vision where FinServ Foundation is largely led by Fellows who once came through our programs themselves. That is how a true legacy is built.

Thank you for being part of this journey. Remember, we need your help through events, mentorship, hiring, and funding. FinServ remains an entirely donation driven origination where 100% of donated funds go directly to the students. All operational costs of FinServ Foundation are funded by the volunteer board members. Together, we are shaping the future of our industry.

With gratitude and optimism,

Jamie Hopkins
Chairman and President
FinServ Foundation

A LETTER FROM THE EXECUTIVE DIRECTOR

By: Victoria O'Tool

Dear FinServ Foundation Family,

When I stepped into the role of Executive Director this past June, it felt like coming full circle. I know this program not just as a leader, but as a graduate. I know what it feels like to sit on the other side of the table, to be a student hungry for guidance and mentorship, eager to find a place in this industry, and to discover that the FinServ Foundation could open doors I never imagined possible.

Taking on this role has been more than a career milestone; it has been an invitation to give back. To take the best of what this program gave me, to polish and strengthen it, and to work tirelessly to improve the areas that need more care and attention.

Since June, I've had the privilege of meeting nearly 100 of our fellows face-to-face at four of the five conferences we attended this year. I was also able to reconnect with Sheena Gray, CEO of Quad-A, at the Invest in Women Conference in April, which helped facilitate nearly two dozen of our students attending the Quad-A V.I.S.I.O.N. Conference in Washington, D.C., this fall, which was a huge success.

One of my proudest accomplishments this year was personally securing a new partnership with Dalton Education, which now provides three annual SIE review scholarships and three CFP® review scholarships for our fellows.



I also worked to reimagine our monthly coaching calls, making them more interactive and organized, and created a conference committee of four fellows to help execute our growing event calendar.

Ahead of us lies the work of deepening our mentorship programs, expanding our network of partners, and sharing the inspiring stories. Every change we make, every connection we forge, every conversation we start is with one goal in mind: to prepare and empower the next generation of financial professionals to lead with excellence and purpose.

It has been an extraordinary first half-year, and as I look ahead, I could not be more hopeful about where we are going. Thank you to our fellows, mentors, sponsors, and partners for walking alongside us. Together, we are writing the next chapter of The FinServ Foundation's story, and I cannot wait to see what we accomplish next.

A Year's Overview

WHERE WE ARE NOW

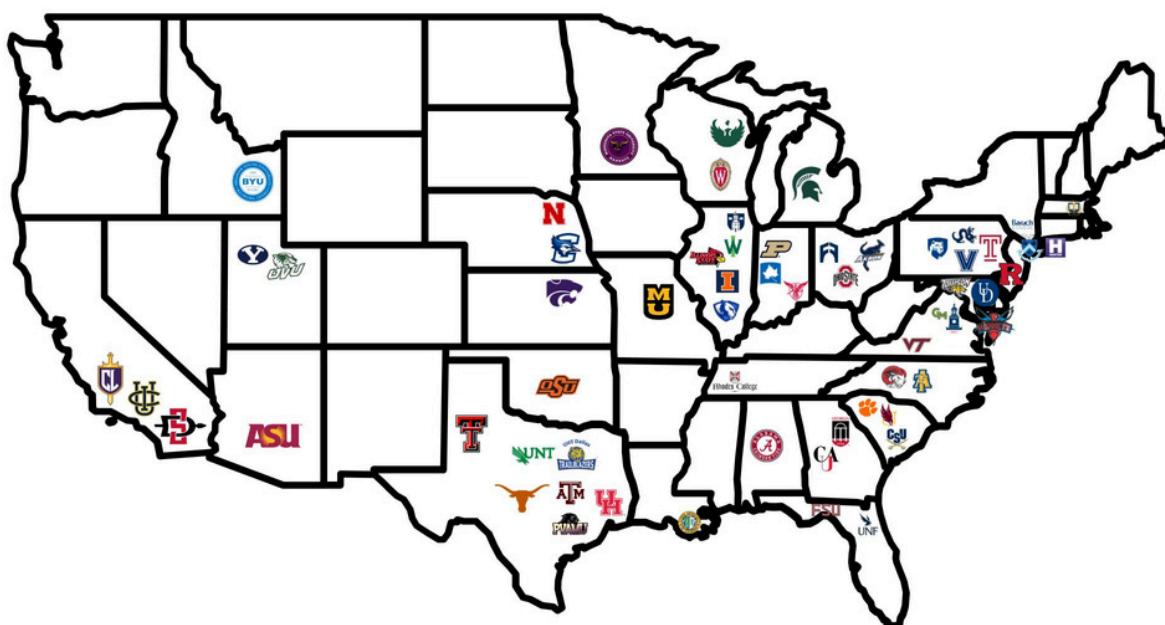
This year marked a major milestone for the FinServ Foundation. In 2025, we successfully hosted two full cohorts, 100 fellows in both the spring and fall, representing some of our most diverse cohorts to date. Fellows joined us from universities across the United States, including several institutions that had never previously been represented in our program.

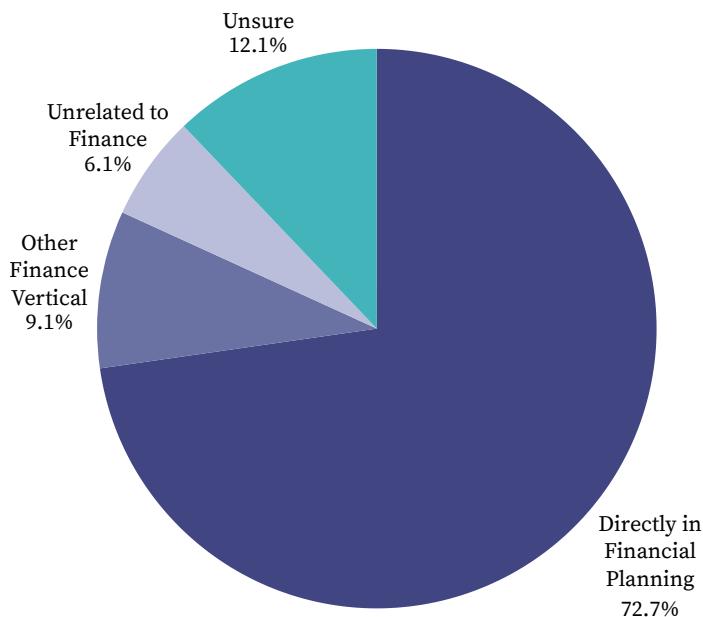
We also expanded our academic reach by forming new partnerships with CFP® programs and strengthening relationships with existing ones, connecting with students at more than 50 universities nationwide. Over the course of the year, our growing network of mentors and industry professionals contributed more than 2,000 hours of mentorship through our six-month mentorship program, while fellows participated in 24 professional workshops as part of the two-year fellowship experience.

In addition, we fully sponsored conference attendance for students at five industry conferences, creating invaluable exposure and networking opportunities.

Our board members represented the Foundation through speaking engagements and industry recognition, while new partnerships, including collaborations with eMoney and Dalton Education, allowed us to offer the eMoney Certificate and SIE and CFP® Review to support our fellows.

Through continued growth, strategic partnerships, and an unwavering commitment to impact, the Finserv Foundation remains dedicated to coaching, connecting, and mentoring the next generation of financial leaders.





WHERE OUR FIRST COHORT IS NOW

The McKinsey study highlighting the high dropout rate within the financial planning profession has been widely cited, and the FinServ Foundation was created to help reverse that trend. To evaluate our impact, we conducted a follow-up study of our inaugural cohort, leveraging LinkedIn research and direct outreach to track their career progress three years post-graduation.

Findings from this review show that more than 70% of fellows from the first cohort are currently working in financial-planning-related roles, including financial planners, paraplanners, and client service specialists. Of these, 46% have earned the CFP® designation, and nearly all others hold professional credentials such as FINRA licenses.

In total, more than 80% of the cohort remain in finance, with approximately 10% working in other areas of the industry, such as consulting or analyst positions. A small number of individuals have transitioned outside of finance, and approximately 12% of the cohort could not be located through online or email outreach.

These professionals are now contributing to firms across the country, with representation in New York City, Seattle, Denver, Atlanta, College Station, Rock Hill, Kansas City, Minneapolis, Washington, D.C., Charlotte, and many other cities nationwide. Overall, the data demonstrates that FinServ Foundation fellows are not only entering the profession but are also thriving and advancing their careers within it.

2025 CONFERENCE ATTENDANCE OVERVIEW

In 2025, FinServ Foundation proudly sponsored student fellows to attend five major industry conferences across the country, providing them with unparalleled networking opportunities, exposure to industry leaders, and hands-on professional development.

FSI OneVoice | January 27th-29th, 2025 | Dallas, TX

We kicked off the year at FSI OneVoice, where fellows connected with executives and gained insights into advocacy efforts shaping the independent financial services industry.



Invest in Women | April 21st–23rd, 2025 | Boston, MA

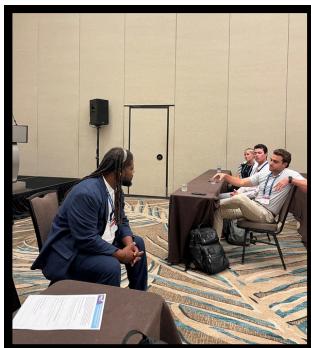
Fellows engaged with some of the most influential voices advancing women in wealth management, participating in workshops and panels focused on diversity, leadership, and innovation.

**Wealth Management EDGE | June 10th–12th, 2025 | Boca Raton, FL**

Our fellows joined thousands of industry professionals for three days of learning about cutting-edge technology, practice management, and growth strategies in wealth management. Plus, three of our fellows were panelists for a next-gen discussion!

**FPA NexGen Gathering | August 26th–28th, 2025 | Orlando, FL**

This conference allowed fellows to collaborate with next-generation planners, share ideas, and build a nationwide network of peers dedicated to shaping the future of financial planning.



Quad-A V.I.S.I.O.N. Conference | September 11th–13th, 2025 | Washington, D.C.
Fellows explored career paths in the wealth management space and participated in high-impact networking events tailored to African American financial professionals.



In addition to these student-centered experiences, FinServ Foundation board members and volunteer staff represented the organization at over a dozen other industry conferences, building partnerships, strengthening industry presence, and ensuring our mission to prepare the next generation of financial professionals remains front and center nationwide.



COACHING OVERVIEW

In 2025, the FinServ Foundation continued to deepen its commitment to developing the next generation of financial professionals through intentional, high-impact coaching. Throughout the year, we hosted 24 professional workshops, covering a wide range of critical topics, including hard and soft-skill development, industry knowledge, technology, and career readiness.

None of this work would be possible without the generosity and dedication of our speakers, who consistently volunteer their time, expertise, and insight to support our fellows. We are especially grateful to our Director of Coaching, Danny Harvey, whose leadership, thoughtful moderation, and behind-the-scenes coordination ensure that each coaching session is both impactful and well-executed. His commitment plays a vital role in the success and continuity of our coaching program.

In addition to our monthly virtual calls, we began offering the eMoney Certification, thanks to a partnership and sponsorship with eMoney, expanding fellows' access to industry-leading financial planning technology and credentials that are increasingly expected in today's workforce.

Looking ahead to 2026, our coaching pillar is entering an exciting new era of growth and transformation. While we will continue to offer monthly coaching calls, we are launching a structured, four-module asynchronous Coaching Program designed to provide a more comprehensive and intentional learning experience. These modules include:

DISCOVERING YOUR PATH

Explore your strengths, the 12 Tribes of Financial Planning, and the power of networking and mentorship.

INDUSTRY KNOWLEDGE

Learn how to evaluate firms, use advisor tools, understand compensation, and stay ahead of industry trends.

THE BUSINESS OF YOU

Build your personal brand with training in leadership, time management, mindset, and goal setting.

BUSINESS DEVELOPMENT

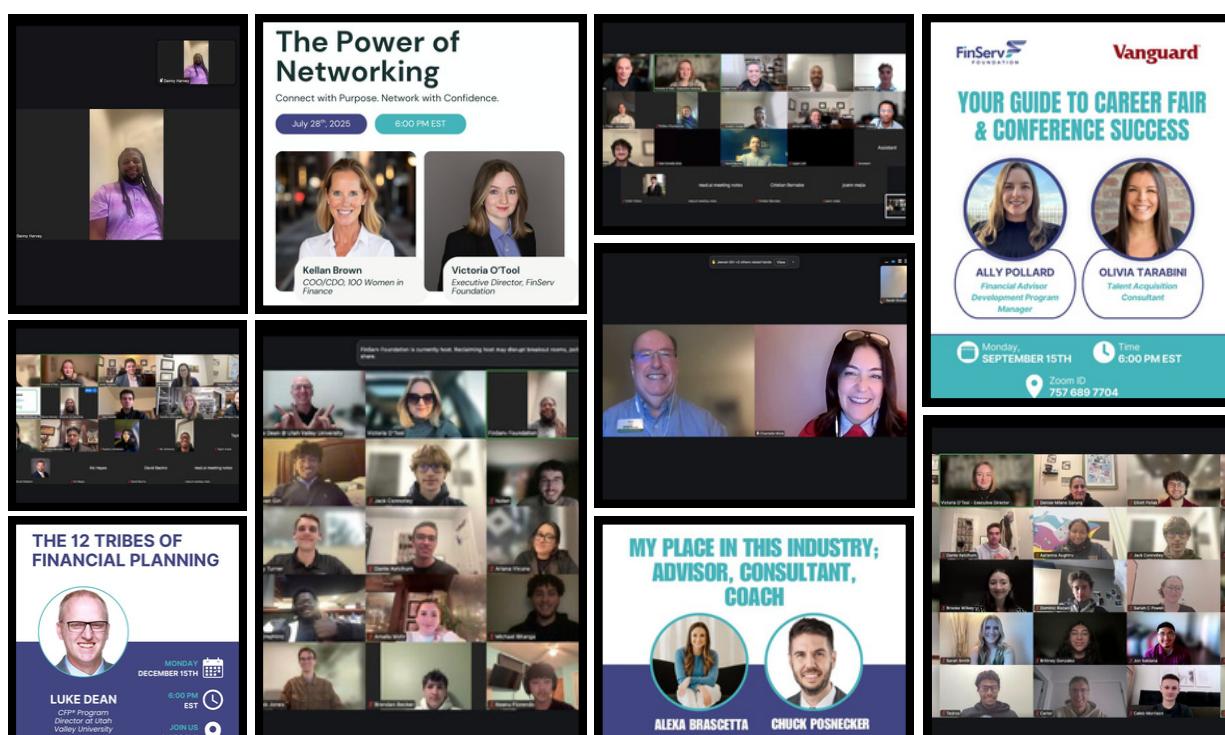
Master prospecting, referrals, client communication, and strategies for winning new business.

For the first six months of the program, fellows will continue to complete the “Discovering Your Path” module through monthly virtual calls, then will transition into an asynchronous course format, allowing them to complete the remaining content on their own timeline within the 2-years. Upon completion of all coaching requirements, including the full coaching curriculum, a six-month mentorship, and conference attendance, fellows will receive a certificate of completion prior to the end of their two-year fellowship.

In 2026, we are also excited to expand access to industry technology through new partnerships. Fellows will gain hands-on exposure to MoneyGuide Pro, the Envestnet on Campus program, and Holistiplan. These tools are commonly offered at top CFP® programs, yet remain inaccessible to many students nationwide. By providing this access, the FinServ Foundation is helping close the gap for students and universities that currently lack the connection to these resources.

We are equally excited about the depth and caliber of speakers joining our coaching calls in 2026. Notable speakers in 2025 include Daniel Crosby, Kellen Brown, Luke Dean, Erin Wood, Eric Leeper, and many more, each bringing unique perspectives and real-world experience that enrich our fellows’ learning and professional growth.

Moving forward, we are focused on further solidifying our coaching program by pairing live coaching with high-quality online courses, expanding hands-on technology experience, and positioning the FinServ Foundation as both a student resource and a strategic partner for universities. Through these efforts, we aim to elevate coaching beyond professional development and into a defining pillar of opportunity, access, and industry readiness.



MENTORSHIP OVERVIEW

In early 2025, we were excited to welcome Samantha Allen as our Director of Mentorship. Since stepping into the role, Samantha has played an instrumental part in strengthening the program and has successfully matched nearly 200 students with industry mentors, ensuring that each pairing was intentional, thoughtful, and aligned with the goals of both mentor and mentee.

We are incredibly grateful for Samantha's leadership, organization, and dedication to building meaningful connections across the FinServ Foundation community. Her work has helped elevate the mentorship experience for both students and professionals, reinforcing the value of personalized guidance and long-term relationship building.

While the numbers speak to the program's growth, the true impact of mentorship is best told through the voices of those who participate in it. Below, we invite you to hear directly from our mentors and mentees as they share their experiences, insights, and reflections on what the FinServ Foundation's mentorship program has meant to them. We are also proud to highlight moments captured through photos that showcase the relationships and connections formed throughout the year.



Meet Faith R.,

Faith is a junior at the University of Alabama and an Honors Finance and Economics student who is part of the Spring 2025 FinServ Foundation Fellowship Program. Through the 6-month FinServ Foundation mentorship program, Faith was paired with a mentor at Vanguard, a connection that played a pivotal role in her professional development.

“I received an amazing mentor through the FinServ Foundation who works for Vanguard. She introduced me to their college-to-corporate advice internship and helped me network and prepare for interviews. I received an internship offer for Summer 2026 from Vanguard, and I don’t think I would be here without her support.”

Faith's story is just one example of the real-world impact mentorship can have when meaningful relationships are paired with opportunity and guidance.

Explore additional testimonials below from our mentors and mentees to see how the FinServ Foundation's mentorship program continues to create lasting connections and open doors across the financial services industry.

“

“Incredibly grateful to the FinServ Foundation for pairing me with Rob Wick in their mentorship program. Couldn’t have been a better pairing together! His guidance has challenged me to think bigger about the impact I want to make in financial services. It was great connecting in Colorado and continuing the mentorship conversations that have shaped both my personal and professional growth.”

~ Joseph Luciano
Illinois State University
FinServ Fellow

“

“Much to be thankful to FinServ Foundation. What a tremendous experience it was to be partnered with Joseph Luciano. Together we were able to accomplish great things. Most important was his direction upon graduation and where he would like to make an impact within the financial services industry. While Joseph lives in IL, he was recently in CO and we couldn’t pass the opportunity to connect. Amazing young man and a name to keep an eye out for as he inevitably will be a leader within the industry.”

~ Rob Wick
Wealth Strategies
FinServ Mentor



FinServ

FINSERVFOUNDATION.ORG

“

“I will always be grateful that FinServ paired me with Evelyn Gellar for the mentorship portion of the program. From our very first call, she elevated my perspective on the profession by teaching me how to network strategically and challenge the false narratives I had about myself. Learning from her not only opened doors to remarkable opportunities but also brought me a lifelong mentor and friend.”

~ Emeri Gibson
Undergraduate Student at UVU
B.S. Personal Financial Planning
FinServ Foundation Fellow

“

“Impactful mentorship happens when two people commit to growth, and as my very first mentee in the program, Emeri has shown that with every step she takes on her journey. Watching her push past limiting narratives, expand her network with intention, and embrace new opportunities has been remarkable. Thank you, FinServ, for creating this connection and thank you, Emeri, for trusting me along the way.”

~ Evelyn Gellar, RICP
Managing Director, Forest Hills Financial Group
FinServ Foundation Mentor



FINSERVFOUNDATION.ORG





WEALTH FOR GOOD

On June 26th, 2025, our Founder and President, Jamie Hopkins, and Treasurer, Bonnie Treichel, traveled to London to accept two prestigious awards on behalf of the FinServ Foundation at the WealthBriefing Wealth for Good Awards. The Foundation was recognized in the categories of Initiative or Program in the Americas and Thought Leadership in the Americas, honoring our continued impact in advancing financial education and access within the industry. This is the second year in a row we have been named winners in these categories.

Our program was also featured in Acclaim, a publication by WealthBriefing, further spotlighting our mission and growing global influence.

WEALTHIES

FinServ Foundation was honored to be nominated in two categories for the 2025 WealthManagement.com Industry Awards: Corporate Social Responsibility – Young Advisor Development Program and Industry Associations – Fellowship Program. With more than 1,200 nominations submitted, being recognized among the industry's leading innovators was a meaningful milestone for our organization.

While we did not take home the awards this year, we are proud of the impact our programs continue to make, and we're more motivated than ever to come back even stronger next year.



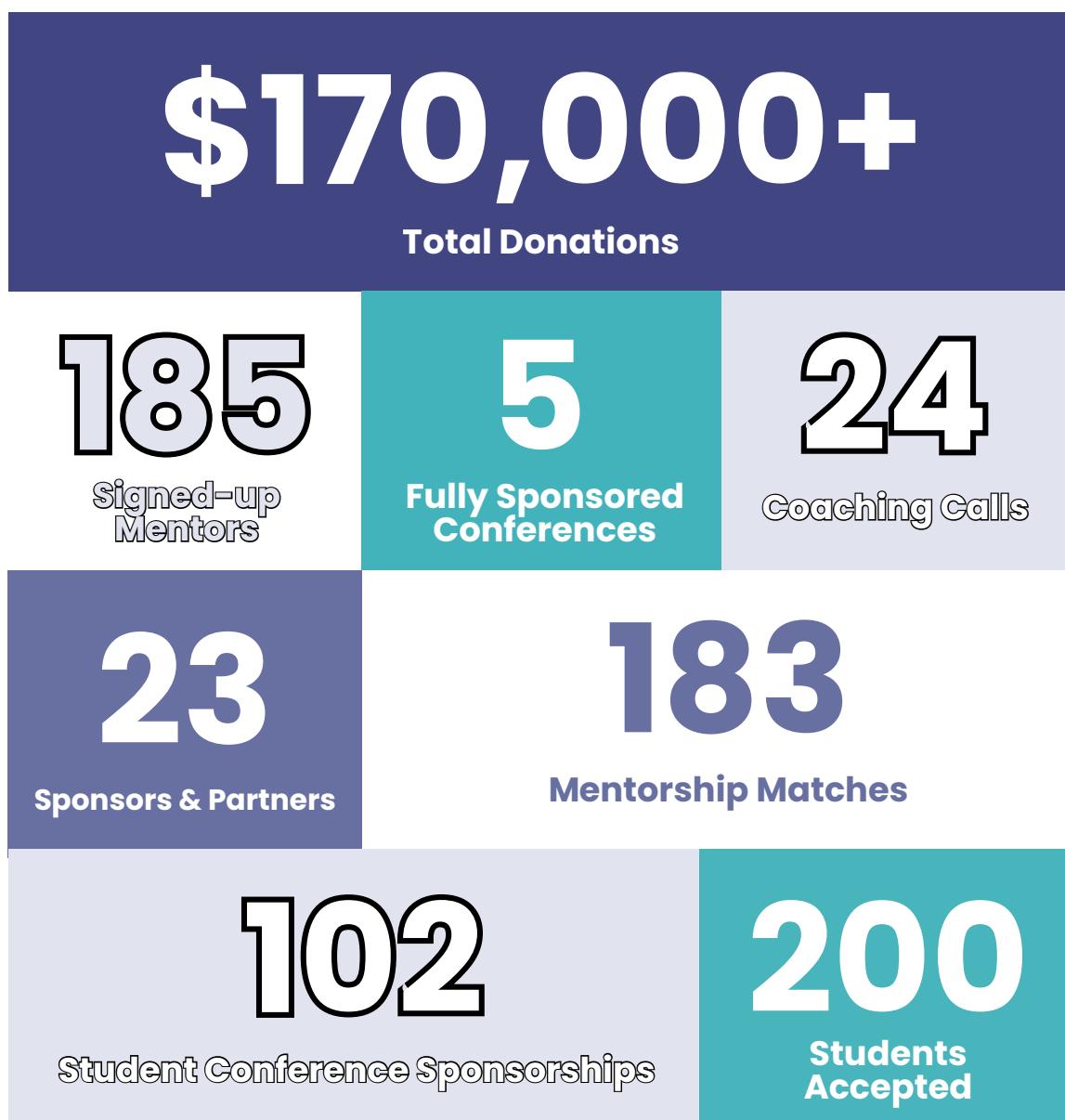
CORPORATE SOCIAL RESPONSIBILITY
YOUNG ADVISOR
DEVELOPMENT PROGRAM

INDUSTRY ASSOCIATIONS
&
FELLOWSHIP PROGRAM

This Year's Important

NUMBERS & STATISTICS

We're excited to share several major growth milestones for the FinServ Foundation in 2025! In addition to increasing the number of conferences we attended and continuing to grow our mentor database, we're proud to announce that, thanks to our sponsors, we will be increasing cohort size from 100 to 150 students starting in Fall 2026. This growth allows us to support 300 students per year and expand our impact on the next generation of financial professionals.



A Year's Overview

FINANCIAL HIGHLIGHTS

In 2025, FinServ Foundation achieved its strongest financial year to date, raising more than \$170,000, marking our highest donation total since inception. This milestone was driven not only by larger contributions but by the broadest base of support we have ever seen, with more individual and corporate donors than any prior year. We were proud to welcome new first-time firm partners, including WisdomTree, FP Transitions, and WealthAccess, reflecting growing industry alignment around the importance of developing next-generation talent. This momentum gives us great confidence as we head into 2026, with several significant new partnerships already in progress and soon to be announced.

We enter 2026 in our best financial situation since inception, with many strong commitments for 2026 totaling over \$100,000 already, and more than \$230,000 already received for future years.

Just as important as direct fundraising were the many in-kind contributions that expanded our reach and impact. Partners such as eMoney, WealthManagement.com, Orion, FIS, Nitrogen, and Broadridge provided education resources, professional designation scholarships, conference registrations, and technology training for our Fellows. These contributions materially lower barriers to entry for students and early-career professionals while accelerating their development. Non-cash partnerships like these are a critical component of our long-term sustainability and allow us to deliver high-quality programming at scale.

Looking ahead, we are setting an ambitious but achievable fundraising goal of over \$300,000 in 2026, building on the trust and momentum established this past year.

We are deeply grateful to partners who support us beyond dollars, including PodPony, which manages our podcast production, and Vocatus, which generously donates its expertise in public relations and media support.

Together, our financial supporters and strategic partners enable FinServ Foundation to invest directly in people, ensuring the next generation of financial services leaders has the tools, access, and confidence to succeed.

Highlighting Our Best & Brightest

FELLOW HIGHLIGHTS



At this year's Wealth Management EDGE conference, three FinServ Foundation fellows—Jenna Smith and Emeri Gibson of Utah Valley University and Jared Rhein, a recent Michigan State University graduate now at JPMorgan, were selected to speak on an exclusive panel led by Suzanne Syracuse. The fellows shared powerful insights on what the next generation of advisors are looking for in internships, mentorship, and firm culture, contributing to one of the conference's most well-received sessions. The panel was such a success that [WealthManagement.com](https://www.wealthmanagement.com) published an article highlighting their perspectives, further showcasing the strength and impact of our fellows and the FinServ Foundation.



Jenna Smith



Ian Mueller



Brock Niederer



Keira Vu

This year, four of the fifteen winners of the Schwab RIA Talent Advantage Scholarship were FinServ Foundation Fellows—Jenna Smith, Ian Mueller, Brock Niederer, and Keira Vu. Now in its fifth year, this national scholarship saw more than 600 applicants from over 60 universities, with each recipient awarded \$15,000 toward the 2025–2026 academic year along with a dedicated industry mentor. With these new awardees, the FinServ Foundation now proudly celebrates thirteen total scholarship winners since the program began, further demonstrating the exceptional talent and growing impact of our fellowship community.



FinServ Foundation brought 20 fellows to the 2025 Quad-A V.I.S.I.O.N. Conference in Washington, DC. Among them, three standout fellows—Nana Kojo Kesseh, Seyi Olabanji, and Drevin Watson were featured in *The Daily Upside*. The article highlighted their perspectives on breaking into the profession, building trust with clients, and redefining success as young Black advisors in today's industry.

Highlighting Our Best & Brightest

VOLUNTEER STAFF HIGHLIGHTS



AMANDA BEARDEN
UP & COMER
AWARD RECIPIENT



JAMIE HOPKINS
40 UNDER 40
PHILADELPHIA BUSINESS JOURNAL



DENISE MILANO SPRUNG
THE BACKSTAGE STAR
AWARD FINALIST



CEO, Bryn Mawr Trust Advisors
Chief Wealth Officer, WSFS Bank
Founder, FinServ Foundation

NEW ADDITIONS TO THE TEAM



Samantha Allen
Director of Mentorship

In January, Allen stepped into the role of Director of Mentorship, following the transition of our former director, Kellen Brown, who was hired as the COO/CDO of 100 Women in Finance after building and shaping our program from the ground up. Samantha brings extensive industry and leadership experience through her role as Executive Vice President of Marketing at Merit Financial Advisors. Since joining us, she has successfully paired two full cohorts of mentors and mentees and has become an invaluable resource for nearly 200 fellows and mentors, strengthening the mentorship experience across the entire foundation.



Julien Franklin, CAP
Advisory Board Member

In June, Franklin was appointed to our Advisory Board. Julien serves as the Vice President of Endowments, Foundations, and Charitable Giving at Bryn Mawr Trust and brings a robust, seasoned background in the financial services industry. We are excited to see how his insight and leadership will help shape the future direction of the foundation.

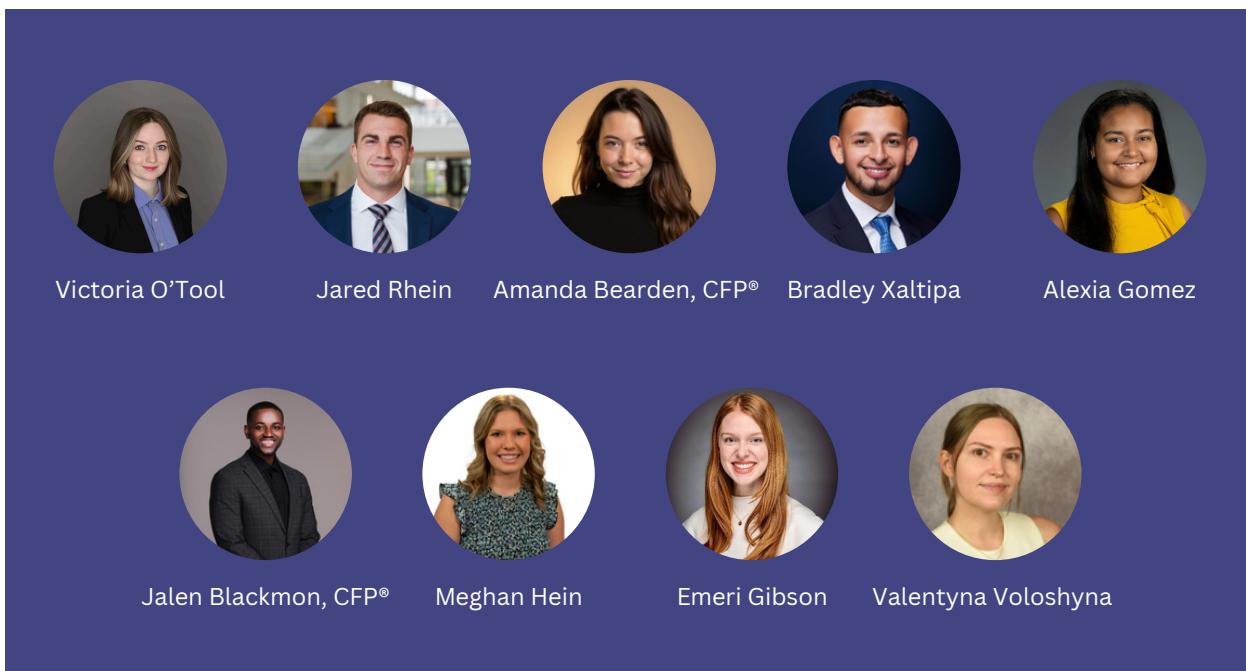


Victoria O'Tool
Executive Director

In June, O'Tool joined the Foundation as Executive Director, bringing both her experience as a graduate of the program and her deep commitment to its mission. Since joining, she has transformed key areas of the organization, building internal systems, strengthening programming, securing new partnerships and sponsorships, and meeting nearly 100 fellows at conferences across the country. Victoria's leadership has brought meaningful enhancements to the foundation, and her passion for service continues to guide FinServ toward its next chapter of growth and impact.

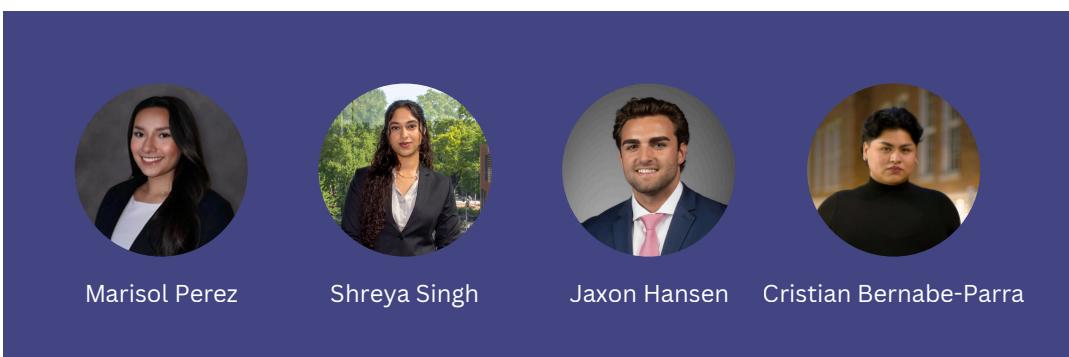
Fellow Advisory Board

Early in the year, Hopkins had the idea to form a Fellow Advisory Board to help kickstart the original vision of the FinServ Foundation, an organization led by past fellows who have experienced the program firsthand. With the support of Executive Director, O'Tool, the Fellow Advisory Board was created, made up primarily of past FinServ Foundation fellows with a few current fellows included. This group now plays an active role in interviewing prospective fellows, assisting with webinars, hosting coffee chats, and offering valuable insights from their lived experience. We are excited to see how these advisory board members continue to step up and lead within the organization.



Conference Committee

Before becoming Executive Director, O'Tool served as the Director of Conferences. Instead of finding a replacement, she formed a Conference Committee of four current FinServ Foundation fellows to help plan and run the conferences. Selected in July, this team will bring new energy and support to executing conferences starting at the beginning of the year.



2026

NEW ADDITIONS TO THE TEAM

We kicked off 2026 with two exciting additions to the FinServ Foundation Board of Directors: Erin Wood and Brian Hamburger. We are thrilled to welcome both to the team and grateful for the leadership, insight, and experience they bring to our mission.

Given the depth of their experience, their full bios extend beyond what we could include on a single page. We invite you to learn more about Erin and Brian by visiting finservfoundation.org/our-team, where their complete backgrounds are featured. We also shared the announcement in a recent press release on our LinkedIn page and encourage you to give it a read.

We are incredibly excited to have both join the FinServ Foundation and look forward to the impact they will make in the years ahead.



Erin Wood, CFP®, FBS®
Board of Directors

Erin Wood brings over 20 years of experience humanizing financial planning. As SVP of Advanced Planning, Erin leads innovation for AssetMark's new wealth solutions, secures strategic industry relationships, and oversees a team of specialists who work directly with advisors and their high-net-worth clients.



Brian Hamburger
Board of Directors

Brian is an entrepreneur, attorney, consultant, speaker, columnist and outspoken industry advocate for independent investment advisers and wealth management firms. For more than 25 years, he has served at the helm of the MarketCounsel companies and the Hamburger Law Firm.

FUTURE INITIATIVES

Looking ahead, 2026 marks an exciting period of growth for the FinServ Foundation as we continue enhancing the fellowship experience. A major development will be the evolution of our coaching pillar. The first six sessions, *Discovering Your Path*, will remain live and interactive, while the remaining 18 sessions will transition to a flexible, self-paced online curriculum. Fellows will still complete the full coursework, a six-month mentorship, and a conference to graduate and receive a certificate.

We are also prioritizing SIE exam access by securing a sponsor to cover preparation and exam costs. Hands-on learning will expand through platforms like eMoney, MoneyGuidePro, Envestnet, Holistiplan, and opportunities to earn the AIF® certification and continuing education credits.

To strengthen mentorship, we aim to grow from roughly 200 to 300 mentors in 2026, ensuring each can provide high-quality guidance. Exam-related scholarships will also expand, building on our Dalton Education partnership for CFP® and SIE review, with plans to establish additional partnerships.

Finally, we have created a resource drive that will continue to grow, providing fellows with support in resume building, interview prep, salary negotiation, financial literacy, personal branding, scholarships, and job search resource complementing the fellowship curriculum and helping fellows succeed beyond the classroom.

We look forward to supporting the next generation of financial advisors in 2026 and beyond through the FinServ Foundation Fellowship Program.





wealth.com



Focal



THANK YOU TO ALL OUR PARTNERS & SPONSORS

We wouldn't be able to do this
without your support!



Dalton Education
BY CERIFI



FINANCE of AMERICA
- REVERSE™

Thank You!

The FinServ Foundation is a volunteer 501(c)(3) organization dedicated to creating a more sustainable, inclusive, and successful path for college students into the financial services industry by providing mentorship, coaching, and community.

Our Contact Information



E-Mail

Director@finservfoundation.org



Website

<https://finservfoundation.org>

