



Future  
IM/Pact

# Partner pitch

Uniting the investment management industry to achieve gender parity by 2030

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[future-impact.com.au](http://future-impact.com.au) | A Yo&Co program

# Join us

We make it easy and fun for your people to inspire and recruit the next generation of female investment managers and private wealth advisers.

Our programs support women at university and professional women working in relevant feeder roles to launch an investments career through education, technical skills development, mentoring and advocacy.

Connection with industry through our partners is vital. Work with us to launch the career of more female investors and advisers, and give your people the platform to make a difference.



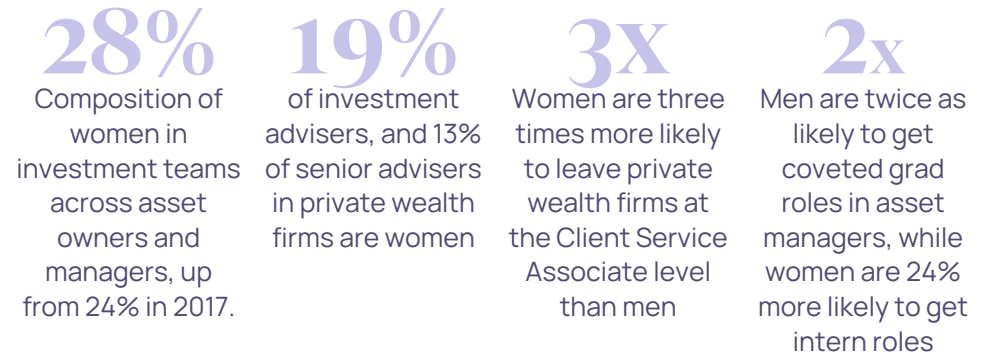
# The problem we're solving

## Structural and cultural barriers impede women's access to career opportunities in front-office investing

A range of factors make it challenging to recruit and retain great women in investments and private wealth.

- **Opportunities to improve diversity are limited**  
- investment and private wealth teams are small and turnover is low.
- **The industry doesn't build grassroots talent;** it mostly hires talent with 3-5 years' experience for junior investment roles.
- **Women at university and in their early career are less likely to know about careers in investments and private wealth,** and the skills, mindset and networks they need to develop.
- Building grassroots talent is **too expensive and time-consuming** for most organisations so they poach each other's women.
- A lack of **great people leaders, few female role models and male-dominated cultures** leave many female investors and advisers feeling they don't have advocates supporting their careers, despite loving what they do.

Our 2024 Path to Parity and Women in Wealth reports found these factors contributed to the following outcomes.



**Yet, parity is possible by 2030 if we address retention and promotion issues, develop people leadership capacity and nurture grassroots talent.**

# Addressing barriers across the career lifecycle

We help great female talent launch and build a fulfilling career in the front-office while inspiring leaders to create the environment where everyone can do their best work. Here's how.



Students

## Discover the world of investment management

- Top talent group
- Mentoring circles
- Investment competition
- Podcast
- Events
- Online resources
- Career coaching and advocacy



Early Career

## Launch your career as a professional investor

- Your *EDGE* 6 month mentoring and advocacy program
- Podcast
- Skills profiling
- In-person events
- Career coaching and advocacy



Entry-Level Investor

## Build your network, profile and career plan

- Podcast
- Online resources
- Analyst programs



Mid-Level Investor

## Step-up and gear-up

- *LeveUP* Program
- LIFT Sponsorship and advocacy program
- Podcast
- Online resources



Senior Investor

## Lead and leave a legacy

- Executive coaching
- Adaptive Teams program
- LIFT Sponsorship and advocacy program
- Online resources

How partners participate



Optional partner participation, open to non-partners, program fees apply



# Our partners



# Partner benefits



## Find great talent

Source female intern, graduate and junior investment talent with exceptional academic credentials and a growing passion for investing.

**480+**

Top talent group

**527+**

Early career network

**45+**

Intern, graduate and junior analyst placements



## Build your employment brand

Leverage our high-profile platform to share your commitment to building a more diverse and human-centred investment management industry.

**300K+**

2023 LinkedIn views

**40%**

40% open rate for eNews (1k+ subscribers)



## Fulfill ESG commitments; and leave a legacy

Contribute to growing and nurturing a diverse talent pool via a long-term, integrated program in pursuit of gender parity by 2030.

**21**

industry partners

**120+**

Female students mentored

**20**

Mentees in inaugural Your *EDGE* program



## Engage and support employees

Your employees enjoy high-impact, low-effort ways to make a difference and nurture the next generation. Access free resources and partner discounts on programs aimed at elevating leadership impact.

**60+**

Mentors, judges and speakers since launch

“It’s deeply satisfying to be working on an initiative that is making a tangible difference to improve gender equality in investment teams.”

Sam Hallinan, Industry leader

“Future IM/Pact is doing a fantastic job at building a network of women for the investments industry. I’m so thankful for the opportunity to mentor these incredible young women, and am learning as much as I am teaching.”

Tessa Calligeros, ESG Strategist, QIC

# Don't take our word for it

The perspective of our partners, students and early career talent is what matters most

I love the program, it's a life changer. It helps me keep up to date with the current happenings of markets and gain an understanding of the focus areas in investment management

**Early career talent Nancy Nguyen, Senior Tax Consultant, PwC Australia**



Future IM/Pact provides access to high calibre and diverse industry leaders. The speakers are incredibly engaging and topics are highly relevant. The facilitation is extremely inclusive; everyone feels comfortable and advice is tailored for groups of females at very different career stages, focusing on a multitude of different goals.

**Early career talent Chloe Segal, Investment Banking Analyst at Goldman Sachs**

The mentoring sessions were extremely insightful and I loved learning and listening to everyone's questions and experiences. I have definitely widened my understanding of the industry – looking forward to the next one!

**Student Trisha Tan, Bachelor of Commerce, University of Melbourne**



# Don't take our word for it

The perspective of our partners, students and early career talent is what matters most

It is such a privilege that I get this opportunity. It is always impressive and very inspiring to see the calibre of the next generation that are keen to explore a career in investment management.

**Joycelin Sim, Assistant Fund Manager, QIC**



I love the ideas and energy of graduates who see the world differently from the way I do, informed by their experience, their generation's attitudes and priorities. I hope that I can share some of my experiences with them however I am sure that I will learn just as much from what they will bring.

**Ali Parker, Head of Investment Advisory, TCorp**

I was blown away with the quality of the submissions in the Future IM/Pact investment competition. The students' grasp of the detail, innovative thinking and presentation quality was excellent. It's inspiring to see the next generation of female talent coming through.

**Nicole Kidd, Head of Private Debt APAC, Schroders Capital**





# How to get involved

We know time is your most precious commodity. That's why we make it easy, efficient, fun and rewarding for your investment team and P&C specialists to participate - as much or as little as you can. Participation options are below and full details, including time commitments, are provided in the activity overview.

		Boutique < 8 ppl in investment team	Standard	Premium
Annual fee, 3 year commitment. New partners pay a one-off establishment fee of \$6,500 plus GST.		\$8,000 + GST	\$14,400 + GST	\$18,000 + GST
Profile building	Promotion and profiling across social and digital channels	✓	✓	✓
	Future IM/Pact podcast		✓	✓
	Skills profiles	✓	✓	✓
	Promotion of roles to F/I database	✓	✓	✓
Student cohort	Mentoring circle			✓
	Investment competition judge	✓	✓	✓
	Investment competition case	✓	✓	✓
	Investment competition prize	✓	✓	✓
	Investment competition host	✓	✓	✓
Early career cohort	Early Career mentoring and advocacy program			✓

# Activity overview

Partner opportunities



# Activity overview

## Student mentoring circles

### Purpose

Mentoring circles are an intimate learning and networking experience, designed to showcase female analysts and investors across all levels and provide students with practical tools and insights to position them for a career in investment management

### Time commitment

- 90min sessions, held over three consecutive weeks
- Facilitated by Future IM/Pact
- Consist of open discussion informed by background content
- Followed by a take home exercise (for students) in preparation for the following session

### Resource commitment

- 2-3 mentors which a range of experience, for example a junior analyst, senior analyst and perhaps a portfolio manager
- At least one mentor to be female



Students



# Activity overview

## Student investment competition

### Purpose

A student challenge where gender-balanced teams of two to four compete to solve one of a range of investment problems that showcase the breadth of the investment industry and its impact on the economy and society. This is the flagship event of the year and is an opportunity for partners to see first-hand the best talent in the country and identify potential future employees.

### Time commitment

There are several ways partners can participate

- Prepare investment case challenge and participate in an info session – 3 – 5 hours
- Judge heats – 2 hours
- Judge national finals – 2 hours
- Attend national finals – 2 hours
- Provide paid internship – average 6 weeks

### Dates

- September



Students



# Activity overview

## Skills and micro-credentials - technical

### Purpose

Early career talent are hungry to learn what they need to do to develop their skills and be job-ready when junior analyst roles hit the market.

We're upgrading the website to profile qualifications and micro-credentials, with insights into how these credentials will equip them in their professional investment career.

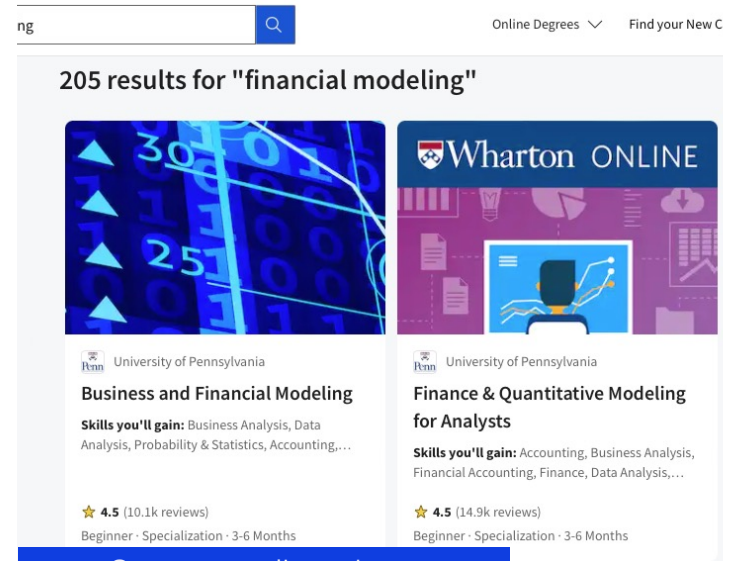
We're keen for investors to prepare a short video overview (5 mins) or more comprehensive 'how to' presentation (15 - 30 mins) on how the qualification or skill will support their career success.

### Priority topics

- Financial modelling
- Python/R
- Portfolio construction
- Preparing an investment thesis
- Principles of managing money
- Understanding and build a passion for markets

### Time commitment - options

- Prepare notes and do short video via Zoom (30 mins - 1 hour)
- Prepare 'how to' and do short Zoom presentation (2-4 hours)
- Prepare more in-depth tutorials (4-8 hours)



Coursera online micro-credentials

# Activity overview

## Skills and micro-credentials - non-technical

### Purpose

Partners told us non-technical skills are equally important to building a successful investment career. Here's how we'll support students and early career talent in that area:

- Profile and share relevant tools, content and resources
- 30 minute 'How-to' webinars with your P&C leaders

### Priority topics

- CV positioning and writing
- Interview skills
- Presentation skills
- How to demonstrate curiosity
- Setting your career up for success

### Time commitment - options

- P&C talent - 2 - 4 hours to adapt any existing material and present
- F/I will capture content from events and share
- F/I runs Leadership Lessons



# Activity overview

## Podcast

### Purpose

Showcase the career stories of great investors – high, lows and everything in between. Focus on profiling great women who are building careers they love while they juggle the realities of life. Passionate male advocates with great career stories also welcome!

navigates various life stages and personal passions

- Tips for launching and sustaining a thriving investment career



Students



Early Career

### Time commitment - options

- 30 min set up interview
- 60 min podcast

### Podcast topics

- Career highs and lows
- The importance of the inner game of investing – building conviction and confidence, and overcoming ego threats, imposter syndrome and other insecurities
- How to think about and develop a long-term career strategy that



# Activity overview

## Early career mentoring and advocacy program

### Purpose

The Early Career Mentoring and Advocacy Program provides women with at least 2 years' work experience with the support, access and development opportunities needed to strengthen their appeal as future investment talent as they pursue their dream career in front-office investing.

### Components

Six months, 1 on 1 mentoring, facilitated by

Future IM/Pact to ensure best matching, maximum engagement and high-impact conversations.

Mentees undergo a rigorous application process to ensure passion and commitment, and are required to complete and present an investment thesis.

### Time commitment

- 90 mins at breakfast launch event
- 60 mins at virtual kick-off
- 1 hour per month x 6
- 90 mins at evening wrap event



Early Career





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# Find out more

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