



Future
IM/Pact

Partner pitch

Uniting the investment management industry to attract and retain diverse investment talent

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We unite the investment management industry in their ambition to attract and retain diverse investment talent, with a focus on women. We do this by helping 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



Early Career



Entry-Level Investor



Mid-Level Investor



Senior Investor

Discover the world of investment management

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

Launch your career as a professional investor

- Skills profiling
- Virtual roundtables
- Leadership lessons
- In-person events
- Research challenge
- Livewire profiling
- Career coaching and advocacy

Build your network, profile and career plan

- Leadership lessons
- Online resources
- Analyst conference (2024)
- Livewire profiling

Step-up and gear-up

- Adaptive Leaders program
- Sponsorship and advocacy program
- Online resources

Lead and leave a legacy

- Sponsorship and advocacy program
- Online resources

How partners participate

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



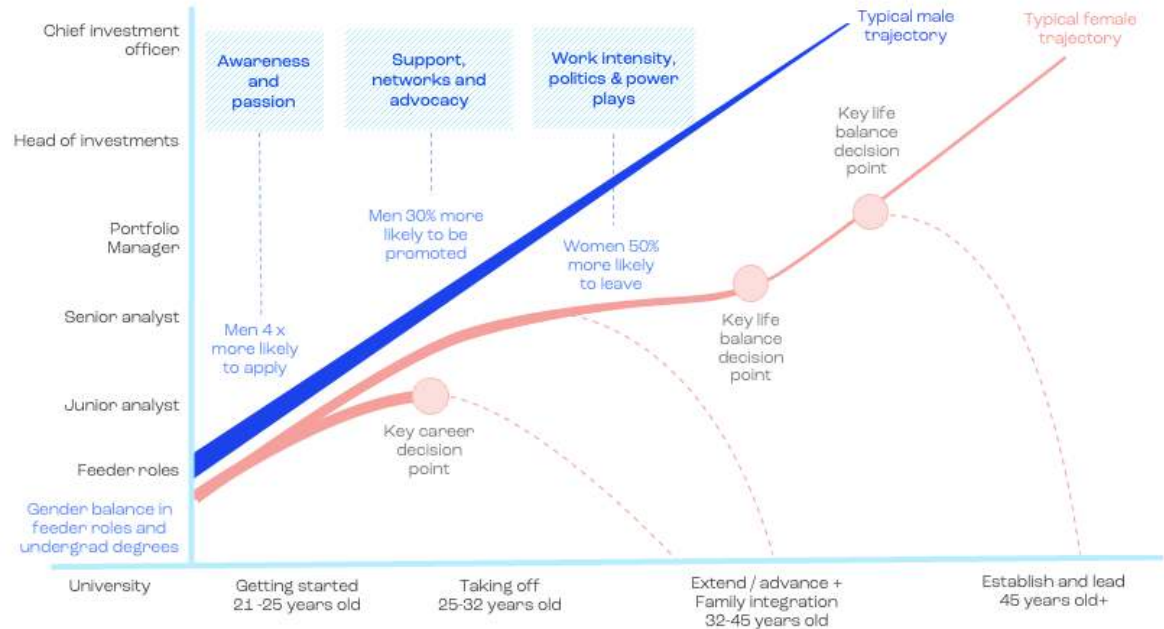
Our partners



The problem we're solving

2016 Mercer research found the lack of women in front office investment roles can be explained by several deeply entrenched structural and cultural issues, including:

- **Opportunities to improve diversity are limited** - investment teams are small and turnover is low
- **The industry doesn't build grassroots talent** from university; it mostly hires talent with 3-5 years' experience for junior investment roles
- Building grassroots talent is **too expensive and time-consuming** for most organisations
- **A lack of support, sponsorship and advocacy** cause mid-level investors to leave their roles at greater rates than men



As a result, women at university and in their early career are less likely to know about the career opportunities in investment management.

Ways to partner

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.

Premium partners

- Mentoring circles
- Investment competition
- Early career roundtables
- Early career in-person events – panellist or mentor
- Online skills profiles
- Jobs platform
- Early career research challenge
- Brand profiling across socials and digital channels

\$15,000 pa plus GST

Standard partners

- Investment competition
- Skills profiles
- Jobs platform
- Brand profiling across socials and digital channels

\$12,000 pa plus GST

Excludes GST and a one-off new partner establishment fee of \$6,500 plus GST. Partners commit for 3-years so we can focus on delivering outcomes.

Partner benefits



Find great talent

Source female intern, graduate and junior investment talent via programs and events

300+
Top talent group

110+
Early career network

30+
Intern, graduate and junior analyst placements



Have a voice

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

240K+
LinkedIn views

1K+
eNews subscribers



Fulfill responsibility and leave a legacy

Contribute to growing and nurturing a diverse talent pool via a long-term, integrated program.

23
industry partners

50+
Female students mentored



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, CEO, Schroders Australia

“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



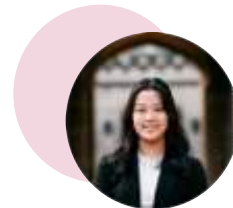
Early career talent Nancy Nguyen, Senior Tax Consultant, PwC Australia



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



Activity overview

Partner opportunities



Activity overview

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

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

- Information session – 31 August 2023 (virtual)
- Heats – 14 September 2023 (virtual)
- Finals – 21 September 2023 (in person)



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

Jobs platform

Purpose

In partnership with Striver, this jobs and candidate database is designed to:

1. Allow partners to mine and connect with the F/I top talent based on skill attributes, quals and participation with F/I activities.
2. Allows talent pool to profile themselves and search for roles within partner organisations
3. Improved tracking and reporting on F/I talent applications and appointments

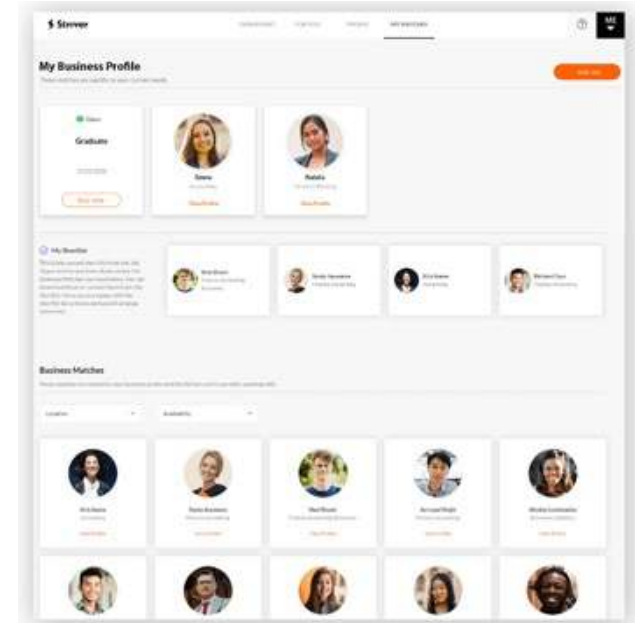
May extend to early investor talent in non-partner firms.

Time commitment

- F/I will manage content upload and maintenance
- Partners send through available positions as per current process

Resource commitment

- Spend as much or as little time looking at emerging talent as you like.



Activity overview

Early career virtual roundtables

Purpose

Virtual roundtables provide access to industry leaders and market insights to help early career (EC) and early investor (EI) women explore career pathways.

Roundtables are casual Q&A discussions with leading investors and analysts, led by Yolanda. Option for teams to participate or to cover themes with participants from a range of partners.

Sessions are recorded and then shared across social channels for a broader reach.

Themes

All roundtables cover the same set themes but with different speakers bringing their perspective, insights and stories:

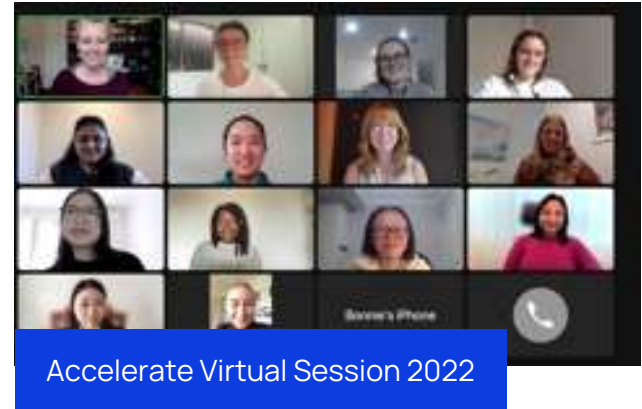
- Investment strategies
- Market insights
- Career stories

Time commitment

45 min sessions held bi-monthly at 5 – 5.45 pm to fit better with the early career talent schedule.

Resource commitment

- 45 mins + 15 min briefing call



Activity overview

Early career in-person events

Purpose

Inspire and support early career and select student talent to explore a career in investment management.

Format

Panel discussion facilitated by Yolanda, and speed mentoring and networking.

Time commitment

90 min breakfast events, 7.30 – 9 am

- NSW – 10 May 2023
- VIC – 30 August 2023
- QLD – 8 November 2023

Resource commitment

- 3 -4 panellists from a mix of partners with a range of experience
- 6 mentors, at least 50% to be female, also from a range of partners and levels
- Venue hosting

Proposed 2023 program

Diverse career paths in the front-office

Panel profiling 4 different roles across different asset classes and segments eg insto v HNW v family office.

How investors are impacting the world

Panel exploring the different ways investors impact society and economies including through direct investing, impact investing and ESG.

Non-traditional pathways

Panel showcasing 3-4 investors who have come from atypical backgrounds eg engineer to PM, immunologist to ESG, military to PM, property manager to fund manager or accountant to analyst.



Early Career



Activity overview

Early career research competition

Purpose

Similar to the student investment competition, the early career (EC) research competition is designed to provide EC talent the opportunity to gain practical skills, knowledge and insight into a career in investment management through the development of a research paper – a task most analysts will complete regularly.

Participating partners to provide an intro to preparing a research paper, some indicative topics and sample papers.

The best 5 papers are briefly presented to a panel of judges, who then challenge the talent on their position.

The best paper wins a 3-month mentorship with one of the judges.

Time commitment

- Prepare and hold 'how to prepare a research paper' - 2 to 4 hours
- Submission review to determine finalists - 4 hours
- Judge national finals - 2 hours
- Provide mentorship prize - 3 months

Dates

- November 2023





Find out more

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