



## Empowering Success in Financial Services with Support to Succeed (S2S)

*Chris Lopez*

### Background: A Journey of Determination and Growth

Christian Lopez, originally from Dallas, Texas, has always been interested in finance but has faced challenges navigating the industry. Before entering the industry, Chris demonstrated strong leadership and management skills by effectively overseeing groups of 20-100 employees at Amazon Warehouse, ensuring team members understood their roles and met workplace expectations. As the training program leader, he onboarded new hires daily, fostering a professional and efficient work environment. Following his role at Amazon, Chris spent six months interning at JPMC through Year Up United, a workforce development program, before working as a banker for a year at PNC Bank. Despite the fact that his leadership skills, passion, and client service skills make him a standout candidate, he found it difficult to break into higher-level investment roles. "I was always interested in investments and financial services, but finding the right opportunity was challenging," Christian recalls.

### Challenges and Barriers

Like many aspiring professionals in finance, Christian faced several challenges. Despite his internship experience, securing a full-time investments-related role was difficult due to the competitive nature of the field. Like many job seekers, he had to apply numerous times before securing interviews. After completing his internship, Christian experienced a period of unemployment before landing a banking role, highlighting the difficulties of navigating career shifts.

### Support to Succeeds Impact - Mentorship & Coaching

Christian Lopez first learned about Support to Succeed (S2S) through a referral from the Year Up program. Recognizing the program's potential, he eagerly participated, seeking structured guidance and career opportunities. "S2S was a perfect fit for me. The structured approach, mentorship, and study resources provided a clear path forward," he shared. S2S offered him essential exam preparation resources, including Kaplan and Achievable, which simplified complex financial topics. "The courses and resources made the learning process much easier. Now, I'm getting licensed and applying those same skills in my current role," he explains. Mentorship played a critical role in his success, with his coaches Meera and Anmarie providing accountability and motivation. "I had a phenomenal experience with my mentors. They held me accountable, made sure I stayed on track, and pushed me to meet deadlines," he says. With S2S's support, Christian refined his resume, expanded his network, and connected with Fidelity and Bank of America professionals, broadening his career prospects. S2S gave him the confidence and knowledge to advance. "The guidance and structured study plan helped me realize that this path could be enriching," Christian reflects.

### Job Highlight

Christian Lopez's journey with Support to Succeed (S2S) directly shaped his career, leading to his role as an Investment Professional at J.P. Morgan. Through structured learning and mentorship, he gained the confidence to advance in wealth management, assessing financial goals, helping clients resolve issues, and analyzing market trends. His transition from banking through the Year Up program, his expertise in client relations, and his fluency in Spanish set him apart. With a 1.5-year contract, he plans to explore investment advisory or banking. J.P. Morgan offers structured career paths, requiring analytical skills, market awareness, and certifications like the SIE or CFP.

### Closing Remarks

Christian Lopez's journey demonstrates how structured guidance, mentorship, and perseverance can help individuals break into competitive industries. Through S2S, he overcame barriers, gained valuable industry knowledge, and secured a promising career in financial services. His story is an inspiring example for others looking to make their mark in the field.