

**MARCH 2026**

**Q U A R T E R L Y**



# **NEWSLETTER**



## **Welcome to the March 2026 Newsletter**

Welcome to the Support to Succeed Quarterly Newsletter!

At Support to Succeed, our mission is to build and develop a pipeline of nontraditional candidates for licensed financial services roles. Each quarter, we will highlight program updates, celebrate achievements, share important resources, and recognize the incredible people who make our work possible.

Over the past few months, we expanded into two new geographies, strengthened employer and community partnerships, and established infrastructure for continued growth.

Thank you for being part of our community and for your ongoing support. Together, we are making a difference—and helping every individual we serve move closer to success.

Warm regards,  
Meera Krishnan, Executive Director

## Milestones & Updates

### From Boston to Western MA

In collaboration with Holyoke Community College and Springfield WORKS, we launched a new program that began on March 16 to create meaningful pathways into financial services careers. This partnership reflects our dedication to building sustainable, community-based opportunities—helping individuals build meaningful careers while strengthening the broader community. Candidates were recruited through Holyoke Community College and Springfield WORKS, as well as through referrals from local employers, who identified internal employees seeking to become licensed and advance in their careers.

One highlight during Women’s History Month: women make up an impressive 78% of participants.



### From Massachusetts to Georgia

The SIE Success Program expanded to Greater Atlanta, Georgia—an important milestone made possible through the sponsorship and partnership of Morgan Stanley and our shared commitment to creating accessible pathways into financial services careers. Our inaugural Atlanta cohort began on March 16, preparing participants for the SIE Exam while offering career education, mentorship, and networking opportunities with Morgan Stanley and other leading firms.

Through information sessions held across Greater Atlanta —with Morehouse College, Kennesaw State University, and YUPRO —we saw strong interest from individuals eager to enter this high-demand field. Morgan Stanley representatives participated in these sessions and continue to support the program through guest speaking and providing career coaching to candidates.



Across all locations, 88% of participants identify as people of color, candidate average age is 31, and over 70% of candidates have 4+ years of work experience.

## Greater Boston Graduation Celebration & Employer Event

Support to Succeed and the Urban League of Eastern MA hosted the “Talent, Licensing, and the Future of Financial Services” event on March 10, which served as both a graduation ceremony and an employer convening in. Proudly sponsored by HUB International, the event brought together employers and emerging talent to discuss the evolving needs of the financial services industry and the critical role licensing and workforce development play in building strong, future-ready teams.

The event also celebrated the graduation of our latest cohort, delivered in partnership with the Urban League of Eastern Massachusetts. Highlights included conversations with employers about hiring needs and industry trends, an opportunity to learn more about Support to Succeed’s SIE Success Program, and a meet-and-greet with candidates preparing to enter licensed financial services roles.



Thank you to the employers who showed up to support our graduates and connect with the next generation of talent.

- HUB International**
- Fidelity Investments**
- Natixis**
- Bank of America**
- JP Morgan Chase**
- TD Bank**
- Edward Jones**
- John Hancock / Manulife**
- Northwestern Mutual**



## Thank You to Our Supporters



We are honored to have been awarded a \$10,000 grant from the TD Charitable Foundation. It's a commitment to expanding access to licensed financial services careers and helping talented, nontraditional candidates build pathways to long-term economic mobility.



Thank you to Morgan Stanley for your sponsorship and partnership to expand our SIE Success Program to Greater Atlanta, Georgia! In addition to sponsoring our program, Morgan Stanley professionals continue to support the program by guest speaking, providing career insights, and offering coaching to candidates as they prepare to enter the field.



We are extremely grateful to Rep. Patricia Duffy & the Davis Foundation for providing the funds that enabled us to implement the pilot cohort in Western Massachusetts!



The Irene E. & George A.  
**Davis Foundation**

## Talent Spotlight

### Jackie Nannyonga Finds Her “Why” in Finance

Jackie Nannyonga’s journey into financial services is driven by purpose and a commitment to her community.

She grew up recognizing the challenges of limited financial literacy. That experience inspired her to learn how to manage money—and help others do the same.

Jackie discovered her passion for investments through Year Up United, where she began her journey into finance. Through Support to Succeed, she found the accountability, mentorship, and resources to push through the SIE exam and unlock her next chapter in financial services.



Today, Jackie works as a Customer Relationship Advocate (CRA) at Fidelity. She recently completed her required licensing for the role, which was one of the first steps in this new role. Now, she is getting trained to start working with general account maintenance and statements. Jackie quotes “You get comfortable as you get access to more opportunities.”

We’re incredibly proud of you, Jackie!

---

## Relevant Article

### US Wealth Management in 2035

McKinsey & Company's report on the future of Wealth Management in 2035 describes an industry undergoing significant change—shaped by demographic shifts, technological advancements, evolving client expectations, and a looming advisor talent shortage. This future highlights a vital point: the human aspects of financial services—relationship building, empathy, communication, and trust—will become even more critical as technology advances.

As the profession evolves, Support to Succeed's work is directly aligned with this transformation, preparing the next generation of advisors who are not only technically skilled but also trusted, empathetic, and adaptable leaders who reflect the clients and communities they serve.

Want to learn more? Read the article [here](#).

---

## Get Involved

### Donate

Your funds go directly towards training skilled individuals from alternative pathways move into high-paying career pathways. Any amount is appreciated, and you can sponsor one candidate for \$3,000.

Make a [donation here!](#)

### Career Coach Volunteer

Interested in providing career coaching or volunteering in another way to help our candidates land licensed jobs and promotions? Please sign up to volunteer with Support to Succeed. You do NOT need to be working in the finance industry!

To express your interest, please [click here](#) or email [Meera Krishnan](#).

### Financial Institution Partnership

Consider hiring our candidates or sponsoring a cohort.

Please reach out to [Meera Krishnan](#) if you are interested.

### Partner with Us to Implement our Program

If you are a nonprofit or community college and you'd like to explore implementing our program, we would like to talk to you!

Please reach out to [Meera Krishnan](#).

