

SUPPORT TO SUCCEED

2025 Year End Review



**Note from
the Founder**

**Milestones
of the Year**

**Success
Stories**

**Metrics of
the Year**

**Partnerships
& Donors**

NOTE: FROM OUR FOUNDER

December 16th 2025

I founded Support to Succeed in early 2024 with a clear conviction: the financial services industry needs new talent in client-facing roles, and adults from nontraditional educational and professional pathways can fill them. We work toward a future where driven individuals—regardless of how they started—advance into visible, influential, and well-compensated roles. In that future, financial services serves as a powerful engine of economic mobility and generational wealth in low-income communities, led by advisors who reflect and understand the people they serve.

Our name, Support to Succeed, reflects our commitment to meeting candidates where they are and providing support tailored to their needs. We recognize the barriers our candidates face in the financial services industry—degree requirements, hiring practices that favor existing employee networks, cultural norms, and challenging licensing exams—and we show up as a consistent partner and advocate at every step.

This year marked our transition from pilot to a partnership-based model. In the first half of the year, we completed our pilot Securities Industry Essentials (SIE) and job preparation program, with over 80% of grads passing the exam and landing new career opportunities. With the support of the Urban League of Eastern Massachusetts, we then launched our first Boston-based program, recruiting candidates from multiple community-driven pipelines - demonstrating how collaboration expands access to financial careers.

As we look ahead, we plan to grow our partnerships in Massachusetts and beyond and to strengthen alumni supports that help our candidates persist, advance, and lead. This year laid a strong foundation, and we are excited for what comes next.

With Gratitude,



Meera Krishnan
Founder of Support to Succeed





MILESTONES: FROM 2025

- JAN** 3 cohorts in the process of studying for the SIE.
 Pilot Cohort 3 Graduation
- FEB** McKinsey's article highlighted a shortage in wealth advisory, supporting our SIE Prep Program for nontraditional candidates. Read about it [here](#).
- APR** Began a partnership with the Urban League of Eastern Massachusetts to pilot our SIE Success Program.
- MAY** Awarded a **\$5,000** grant from the Deshpande Foundation.
- Pilot Cohort 4 and 5 Graduation
- JUN** Awarded a **\$25,000** grant from Capital Group through their 2025 Associate Involvement Grant Program.
- Welcomed our sixth cohort, in collaboration with The Urban League of Eastern Massachusetts - our first partnership-based cohort.
- JUL** Awarded a \$2,500 sponsorship from Loomis, Sayles & Company.
- Our Executive Director, Meera Krishnan, was selected as a 2025 Camelback Fellow through Camelback Ventures.
- AUG** Awarded a **\$5,000** Community Grant from Eastern Bank to advance our Financial Institution Partnership Development efforts across Massachusetts.
- OCT** Hosted a Fundraising Campaign to help sponsor our upcoming cohorts, with hopes of expanding beyond Massachusetts and raised over **\$15,000**.
 Hosted our first in-person graduation ceremony for our past cohorts in collaboration with The Urban League of Eastern Massachusetts.
 Welcomed our seventh cohort, which was the second cohort in collaboration with the Urban League of Eastern Massachusetts.
- DEC** Kicked off a second partnership between Holyoke Community College and Springfield WORKS, with a cohort to start in March.



SUCCESS STORIES: HEAR FROM OUR ALUMNI



Darwin Castellon



Investment Associate at HUB International



“I was working full-time, 50 hours a week, doing the SIE prep at the same time. [The program] was a big push for me - just having that scheduled time to study, and the support brought to me, and it helped me figure it out.”

Shekinah Tabb



Client Associate at Wells Fargo



“By pushing me out of my comfort zone, [Support to Succeed] played a crucial role in helping me adjust after being out of school and no longer having a regular academic routine, consistently encouraging me to study, recognizing my potential, and ultimately grow into a more confident and better version of myself.”



Nasir Cooper

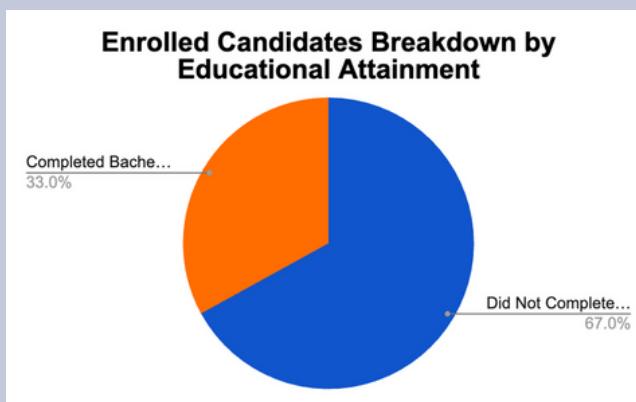
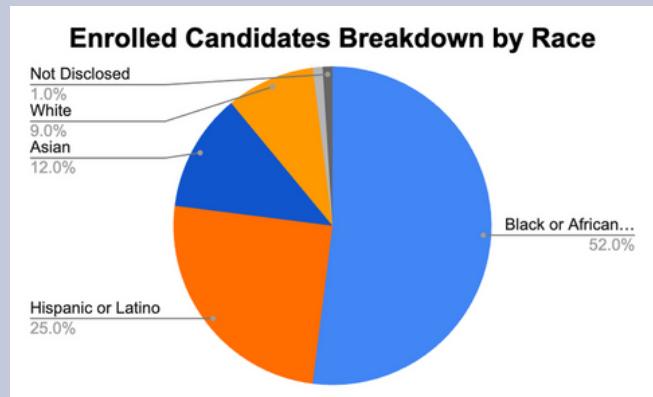
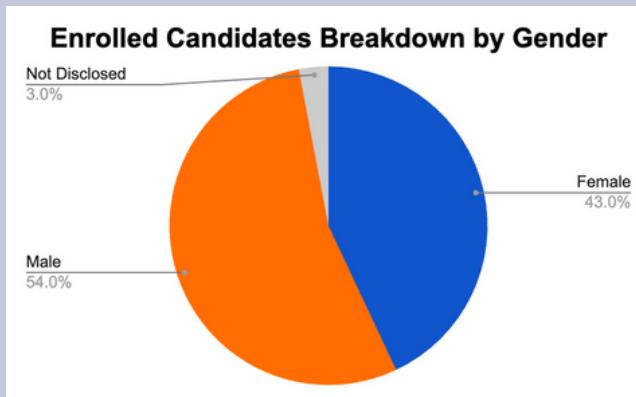


Customer Service Rep at Vanguard



“The best thing I could have done for my career was to join Support to Succeed because of the environment it fostered. This community values accountability and understands that opportunity is the gateway to success. I am extremely grateful for everyone who showed up because I was able to learn from everyone, from instructors to participants to guest speakers.”

Metrics: Of The Year



Overall Enrollment

69 candidates

SIE Completion Thus Far

30 candidates

Trainees have highlighted that our strong community, flexible evening schedule, and guest speakers as key motivators. We've improved support, clarified expectations, and introduced a 3-week trial period to boost retention.

Our high pass rates reflect our weekly personalized coaching that keeps trainees organized and on track to meet their goals, along with our exam readiness criteria that ensure they know when they're ready to take the exam.

SIE Pass Rate

89%

Persistence Rate

58%

**All information is accurate as of December 11th, 2025*

■ METRICS: OF THE YEAR

Our employer-aligned admissions criteria ensure we select candidates with the skills and potential employers are seeking. Combined with our ability to refer candidates directly to employer partners and provide high-quality, targeted interview preparation, these advantages significantly increase our candidates' chances of securing job offers.

Job Attainment

81%

Positions Our Trainees Have Landed

- JP Morgan Investment Associate
- Vanguard Investment Associate
- Fidelity Customer Advocate
- Wells Fargo Client Services Support
- JPMC Relationship Banker
- Hub International Investment Associate
- Loomis Sayles Client Operations
- BNY Mellon Operations Associate
- M&T Bank Relationship Banker
- Santander Bank Relationship Banker
- EACH Enterprises (Retirement Advisory Council) Senior Intern

Thank you to the following employers for hiring our candidates!



**All information is accurate as of December 11th, 2025*



PARTNERSHIPS

Partnerships

Support to Succeed partners with nonprofit training organizations and community colleges to help individuals from nontraditional backgrounds enter licensed roles in financial services. We work with partners to integrate our program into their services or admit their constituents into our programs. Through our partnerships, we ensure our solutions are community-owned and community-led.

Program Implementation Partner



Candidate Referral Support



Job Placement Support



Association for Wholesaling Diversity



**All information is accurate as of December 11th, 2025*



FUNDING: DONORS

Donors

We sincerely thank our donors for their generous grants that help us further our mission and serve the community with integrity. Your trust through your investment means the world to us, and we are grateful to partner with such dedicated organizations. Together, we've achieved great progress, and we look forward to building on this in the coming year. Thank you for your continued support and collaboration.



Donor Highlight

We extend our appreciation to our donors for their generous support this year. We are especially pleased to recognize three women with long and distinguished careers in financial services who are giving back through their philanthropic contributions.



Geeta Aiyer

President & Founder at Boston Common Asset Management



Kathleen McQuiggan

Portfolio Manager at Brown Advisory



Anmarie Ciccolo

Board Chair at Support to Succeed and Former Chief Compliance Officer at Fidelity



2025 Annual Report

Support to Succeed is a 501c3 nonprofit

EIN #99-2674084

All information is up to date as of
December 11th, 2025.