



## November 2024 Newsletter

Welcome to the launch of Support to Succeed's newsletter! We are excited to keep you up-to-date on our progress and achievements.

As a reminder, we are a nonprofit organization building a pipeline of **qualified underrepresented talent** from non-traditional educational backgrounds into **well-paid, licensed financial services roles**. We currently offer Securities Industry Essentials (SIE) exam prep support along with career coaching to help our talent advance in their careers.

### TIMELINE



### BACKGROUND

**Mission:** To build and develop a network of at least 3,000 licensed financial services professionals from diverse and low-income backgrounds across 5 financial hub cities in the United States within the next 5 years.

This year, we are running a pilot program for 50 candidates to demonstrate their ability to pass the SIE exam and land jobs in licensed pathway positions.

- After our pilot, we will be partnering with community colleges and nonprofit training organizations to scale our impact and develop a community of licensed professionals from nontraditional backgrounds

**Securities Industry Essentials (SIE) exam:** The SIE exam is the first licensing exam required for any role involving advising clients on investment products.

[Click here for more information on the exam and career pathways](#)

### MILESTONES & UPDATES

- 1) We launched our website!

2) We have graduated 2 cohorts with an SIE pass rate of 83% and retention rate of 70%. Additionally, we have launched 3 additional cohorts, reaching our goal of 50 candidates.

3) We have received some early recognition: Founder, Meera Krishnan, was selected as a finalist for the Camelback Fellowship, and we exceeded our goal for our first fundraising round.

4) In the upcoming months, we plan to shift towards implementing our program in partnership with community colleges and other nonprofit organizations to serve more participants. Thank you to Year Up United, Roxbury Community College, SpringfieldWorks, Springfield Technical College, CharlotteWorks, JVS, COOP Careers, and Urban League of Eastern Massachusetts for engaging with us in partnership conversations!

## MEET THE FOUNDER

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Founder Meera Krishnan has spent nearly 10 years leading programs for adults from non-traditional backgrounds entering finance and business roles. She is a former Goldman, Sachs & Co. investment banking analyst who earned Series 6 and 63 certifications herself. During her time at Year Up United, she developed a national consumer banking track, built highly successful certification programs which resulted in significant increases in pass rates, and led coaching programs which utilized organizational tools and restorative practices to increase retention & performance of young adults. Meera is a graduate of Princeton University and Harvard Business School.



## RELEVANT ARTICLES

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### [Unlocking Experience-Based Job Progressions for Millions of Workers](#)

This report by Rework America Alliance highlights financial services sales positions as a "gateway" position leading to strong career paths. The report emphasizes the need for systemic changes, such as skill development programs, clearer career pathways, and supportive workplace cultures to enable upward mobility. The report concludes that embracing diversity is a matter of social justice and a strategic imperative for businesses aiming to outperform their competitors.

[Read More](#)

### [Diversity Wins: How Inclusion Matters](#)

This McKinsey report explains how a diverse workforce leads to better business outcomes. It underscores the importance of fostering inclusive environments where diverse perspectives can thrive and demonstrates that companies committed to inclusion are more likely to outperform their peers. The report concludes that embracing diversity isn't just a matter of social justice but a strategic imperative for businesses aiming to outperform their competitors.

[Read More](#)

## ★ TALENT SPOTLIGHT ★

Nasir is a Philadelphia native with a passion for investments and over 6 years of customer service experience. He's currently working in a banking role at JPMC. He aspires to be a financial advisor and joined Support to Succeed to help him on his first step towards getting licensed. Congratulations to Nasir for passing his Securities Industry Essentials (SIE) exam! 🎉

"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."



## GET INVOLVED

### **Career Coach Volunteer**

Interested in providing career coaching to help our candidates land licensed jobs and promotions? Please sign up to volunteer with Support to Succeed. You do NOT need to be licensed to volunteer! Product knowledge about investment products is helpful, but even that is not required. Time commitment: 1 hour per week for approximately 8-10 weeks. To express your interest, please [click here](#) or email [Meera Krishnan](#).

### **Donate**

Your funds go directly towards training underrepresented individuals to move into a high-paying career pathway. You can sponsor one talents for \$1,300 or one program manager for \$5,000. Any amount is appreciated! To donate, [link here](#).

### **Financial Institution Partnership**

Consider hiring our candidates or sponsoring a cohort (\$10,000 - \$20,000). 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'd like to talk to you! Please reach out to [Meera Krishnan](#).

## CONTACT US



Support to Succeed is a MA incorporated non-profit, with tax exempt 501c3 status.

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