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Dear CFP Colleagues:

Improving diversity, equity and inclusion throughout the financial planning profession and wealth management industry is vital for the strength of our sector.

Since 2017, Diversitas has focused on providing events to better understand the industry's opportunities to strengthen underrepresented sectors in the financial planning profession. This program brings together in conversation and learning leaders from the industry, university and high school students who are exploring the industry, and career influencers who can be advocates for the profession and the industry.

We invite you to join us as a Sponsor or Partner University this year in meeting with industry influencers along with young adults interested in joining the financial planning profession and wealth management industry. Be the change with us as we endeavor to remove barriers and improve education, understanding and awareness.

Enclosed is information on how you can become involved in the 2022 Diversitas. If you should have any questions, please feel free to contact me at 330-972-4524 or bmulholland@uakron.edu. If you wish to join us and want to get the process started, please use the URL or QR codes on the enclosed flyers to complete our start-up survey.

Yours respectfully,

Barry S. Mulholland, Ph.D., CFP®, ChFC®
Founder of Diversitas
Director, Financial Planning Program
College of Business
The University of Akron

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Expanding Diversity in Wealth Management

Founded by The University of Akron

DIVERSITAS FACT SHEET

HIGHLIGHTS:

7 CORPORATE SPONSORS

24 PARTNER UNIVERSITIES

INVESTMENT NEWS DIVERSITY, EQUITY & INCLUSION 2022 AWARD RECIPIENT

RIA INTEL FINALISTS

INAUGURAL THINKADVISOR LUMINARIES AWARD RECIPIENT

3000 STUDENTS ENROLLED

DIVERSITAS WHY

OUR MISSION:

Diversitas aims to make the financial planning profession and the wealth management industry more inclusive through education, mentorship, and human connection. We seek to expand the participation of underrepresented groups in the profession and the industry by mitigating the leading barriers to entry – a lack of education, understanding and awareness.

For more information check out the Diversitas resource library at **tinyurl.com/5n7bnndm**

DIVERSITAS OVERVIEW

ABOUT DIVERSITAS:

Diversitas is a financial knowledge symposium bringing leaders in financial planning and wealth management together with career influencers and diversity and inclusion thought leaders, along with university and high school students who are exploring the industry and profession, to build professional hope for young people and career changers in an industry that is working diligently to be fully inclusive. It is brought to the community by the Financial Planning Program in The University of Akron's College of Business.

DIVERSITAS WHO:

Career influencers (people who advise and encourage both students and career-changers about career choices), AND financial advisors who are the best source of information about the career and attributes that make it a great career choice, AND university and high school students who are interested in understanding the financial planning profession and the wealth management industry.

DIVERSITAS WHAT:

A symposium to examine how to attract more women and people of diverse backgrounds into the financial planning profession and wealth management industry.

DIVERSITAS WHEN:

CHECK OUR UPCOMING EVENT DATES AT Diversitas – Expanding Diversity in Wealth Management (**diversitasfp.org**)

OUR WEBSITE:

diversitasfp.org

OUR SOCIAL MEDIA:

@diversitasfp

@diversitasfp

@diversitasfp

Follow along with our hashtag: #DiversitasFP

2021/2022 SPONSORS

KEYNOTE SPONSOR

FARE Financial Alliance for Racial Equity

diversitas Expanding Diversity in Wealth Management

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WHY BECOME A DIVERSITAS SPONSOR:

- **NETWORKING:** Increase your network by attending and speaking at our main and interim events where 640+ participants attend consistently and are encouraged to interact on DEI and Financial Planning topics.
- **WORKFORCE EXPANSION:** Expand your workforce when connected with 3000+ students who are currently studying financial planning at one of our 24+ Partnering Universities. and are looking to obtain a position in the industry as an intern, resident, or permanent role.
- **PUBLICATION:** Get access to 990+ unique visitors that access our website monthly to learn more about the financial planning profession and wealth management industry.
- **PROMOTION:** Gain exposure and expand your reach when promoted on all of our social media platforms where we are making thousands of impressions daily.

WANT TO BECOME A SPONSOR?

There are 3 sponsorship levels:

1. Keynote
2. Presenter
3. Supporter

HOW TO BECOME A SPONSOR:

Please visit **tinyurl.com/ms6fuhcc** or scan the QR code.

Sponsorship Level	Keynote	Presenter	Supporter
Availability	One sponsorship	4 – 6 sponsorships	20 sponsorships
Cost	$20,000	$10,000	$5,000
Keynote speaker for national event (speaker must be vetted and approved by 2021 Diversitas Advisory Board)	•		
Primary placement of personnel in panelist role for national event		•	
Video message running on event website pre- and post-event in loop	•	•	
Listing with logo and active link on Diversitas website, logo placement on dedicated event website and other marketing materials	•	•	•
Ability to submit thought leadership content to the Diversitas Resource Library	•	•	•
One seat on the Diversitas Advisory Board through December 2021	•	•	
Dedicated mention in two social media posts	•	•	
Tagged in at least four social media posts	•	•	•
One dedicated email blast sent by Diversitas to attendee list (content to be approved by Diversitas in advance), plus logo included in at least two other email blasts	•		
Mention in one Diversitas email blast (content to be approved by Diversitas in advance), plus logo included in at least two other email blasts.		•	
Logo included in at least two Diversitas email blasts			•

Regional Sponsorships available:

- National Sponsors are encouraged to sponsor regional programs at our Partner Universities
- Connect directly with the Partner University leaders, faculty, and students
- Choose among Partner Universities that meet your geographical needs
- PartnerU's will provide details on what they offer to regional sponsors
- Listing on www.diversitasfp.org by region as a Regional sponsor (without logos)
- Availability: Only limited at the regional level based upon their needs

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WANT TO BECOME A PARTNER UNIVERSITY?

DIVERSITAS: EXPANDING DIVERSITY IN WEALTH MANAGEMENT

The University of Akron has created Diversitas, which aims to make the financial planning profession and the wealth management industry more inclusive. This can be done through education, mentorship, and human connection for underrepresented groups in the profession and the industry by mitigating the leading barriers to entry. These barriers include a lack of education, understanding and awareness.

The University of Akron is seeking other Universities to become Partner Universities (Partner U) to expand Diversitas' reach to improve diversity, equity and inclusion throughout the financial planning profession and wealth management industry through education efforts among Partner Universities Diversitas also seeks Partner Universities to expand the diversitas mission and goals.

OUR VISION:

Improve Diversity, Equity, and Inclusion throughout the financial planning profession and wealth management industry through education.

BECOME A PARTNER UNIVERSITY:

Please visit **tinyurl.com/ms6fuhcc** or scan the QR code.

PARTNER UNIVERSITY HAVE THE FOLLOWING BENEFITS:

- Listed as a Partner University on Diversitas website
- Be eligible to be one of the Partner University representatives on the Diversitas Advisory Board (six representatives serve a two-year staggard term and are elected from among the current Partner Universities)
- Obtain national sponsor support of local or regional programs
- Use of diversitas name, logo, materials to conduct local events, including raising local sponsorship support for that programming

PARTNER UNIVERSITIES:

- Arizona State University
- California Lutheran University
- California State University - Northridge
- Edinboro University of PA
- Kansas State University
- Michigan State University
- Minnesota State University - Mankato
- The Ohio State University
- Olivet College
- Prairie View A&M University
- Purdue University
- Shepherd University
- Texas A&M University
- Texas Tech University
- The University of Akron
- University of Georgia
- University of Illinois
- University of Maryland Global Campus
- University of North Florida
- University of Texas Rio Grande Valley
- University of the Incarnate Word
- University of Wisconsin - Green Bay
- University of Wisconsin - Madison
- Virginia Polytechnic Institute and State University

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DIVERSITAS PARTNER UNIVERSITY DEMOGRAPHIC SURVEY

ANNUAL RESULTS JUNE 2022

Partner University Demographics[1]		CFP Board Benchmarks[2]	Industry Benchmarks[3]	US Undergrad Population[4]	US Population[5]
Number of Universities Responding	18				
Number of Financial Planning Students	2442	88,726		18.4 M	8.4%
Degrees					
Undergraduate	85.43%				
Masters	8.99%				
PhD	2.27%				
Emphasis – Minor	1.139%				
Post-Baccalaureate Certificate	1.86%				
Gender					
Male	65.19%	76.69%	86%	45.1%	49.2%
Female	34.81%	23.31%	14%	54.9%	50.8%
Non-Binary/Third gender	0%	n/a			
Prefer not to say	0%	n/a			
Not Collected	0%	n/a			
Race/Ethnicity					
Asian	3.59%	n/a		7.6%	5.9%
Black or African American	6.67%	1.68%		15.1%	13.4%
Hispanic or Latino of any race	15.55%	2.46%		20.9%	18.5%
White	62.06%	n/a		52.9%	60.1%
Two or more races	3.00%	0.028%		n/a	2.8%
Other[6]	0.41%	n/a		n/a	1.5%
Prefer not to say	0.61%			n/a	n/a
Not Collected	8.12%			n/a	n/a

[1]Voluntary survey response from early committed 2021 Partner Universities through April 28, 2021
[2]CFP Board Demographics survey news release January 11, 2021
[3]Cerulli
[4]Census Bureau: census.gov/newsroom/press-releases/2018/school-enrollment.html
[5]Census Bureau
[6]Includes American Indian, Alaska Native, Native Hawaiian, or Pacific Islander
n/a - Percentages not reported in press releases or elsewhere

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