FIRST GENERATION COLLEGE ATTAINMENT
THE LIFEVEST IMPACT
THE CENTER FOR INVESTMENT AND WEALTH MANAGEMENT

MISSION
The Center for Investment and Wealth Management (CIWM) provides discussion, study, and application of financial education for all. The Center offers leadership and serves as a resource for financial education with goals of increasing financial literacy, minimizing financial instability for the benefit of society, and training the next generation of financial industry leaders.

VISION
To provide financial education for individuals across all socioeconomic backgrounds to:
- Empower individuals at all stages of life to make smart financial decisions
- Provide opportunities for students, the public, and financial services professionals to enhance their financial knowledge
- Connect the business community with the next generation of financial industry leaders for professional networking and mentorship opportunities

CONTACT
Center for Investment and Wealth Management
4293 Pereira Drive, Suite 3401
Irvine, CA, 92697-3125
Phone: 949.824.2675
ciwm@merage.uci.edu
Website: merage.uci.edu/ciwm-lifevest

@UCICIWM
Our Program

1.2 million students in the United States drop out of high school every year; a majority are from low-income families. Our Pacific Life LIFEvest Financial Literacy Summer Residential Program, now in its 12th year, helps to minimize this opportunity gap by providing teens with the necessary financial skills for college acceptance and retention.

With our program, we strive to instill a lifelong curiosity in personal finance and provide students with a clear pathway out of poverty with our ‘education pays’ mantra. It is imperative these students understand they are equipped to pursue a life of financial freedom. The students we serve come from low-income backgrounds and would potentially be the first in their families to attend college. To that end, we’ve carefully designed our program’s structure to follow them through their high school careers into college.

As of 2019, over 87% of LIFEvest Alumni* attended college

This is 53% percent higher than the national average** for the same demographic.

We are so proud of our program alumni, some of whom now pursue higher education at prestigious universities such as UC Berkeley and Stanford. See page 5.

*Applies to college-aged alumni, approximately 137/158 in October 2019.
** 36% for Hispanics in the nation in 2020 according to National Center for Education Statistics (nces.ed.gov).
LIFEvest just wrapped up its 12th year! In that time we have hosted 850+ students overnight, on campus during summer. The 2022 program offered two weeks for boys and two weeks for girls.

**STUDENTS**

- **>78% of all students**
  - are the first in their family to pursue college

- **~88% of students**
  - are from high schools with >47% of students receiving free or reduced lunch

- **37% of students**
  - are from a single-family home

- **Average GPA: 3.6**
  - of accepted students

**COUNTIES***

- **Orange County**
  - 99 students across 43 high schools in Orange County

- **LA County**
  - 53 students across 24 high schools in LA County

- **Other**
  - 3 students across 3 high schools in other counties including Riverside and San Bernardino County

*Data gathered for the 2022 program year.
College Attendance

We are proud to share that the college enrollment rate for LIFEvest alumni is 87%*. As per the National Center for Education Statistics, college enrollment rate is defined as the percentage of 18- to 24-year-olds enrolled as undergraduate or graduate students in 2- or 4-year institutions.

2-YEAR INSTITUTIONS

Orange County Community Colleges (42)
- Cerritos College (2)
- Orange Coast College (4)
- Golden West College (2)
- Coastline College (2)
- Saddleback College (2)
- Irvine Valley College (2)
- Fullerton College (4)
- Santa Ana College (47)
- Santiago Canyon College (2)
- Cypress College (1)

Los Angeles County Community Colleges (17)
- Citrus College (1)
- Los Angeles Harbor College (1)
- El Camino College (6)
- East Los Angeles College (2)
- Pasadena City College (2)
- Rio Hondo College (3)
- Long Beach City College (2)

Other Community Colleges (2)
- Mount San Jacinto College (1)
- Temple College (1)
- San Bernardino Valley College (1)
- West Hills Community College (1)

4-YEAR UNIVERSITIES

California State University (2)
- CSU Dominguez Hills (5)
- CSU Northridge (1)
- CSU Long Beach (9)
- CSU East Bay (2)
- Cal Poly Pomona (1)
- CSU Los Angeles (2)
- CSU Fullerton (7)
- CSU San Bernadino (1)
- San Jose State (1)
- Humboldt State (1)
- San Diego State (1)

University of California (26)
- UC Berkeley (2)
- UC Los Angeles (5)
- UC Riverside (2)
- UC Davis (2)
- UC Merced (1)
- UC Santa Barbara (1)
- UC Irvine (8)
- UC San Diego (3)
- UC Santa Cruz (2)

Private Universities (9)
- Cal Baptist (1)
- University of Southern California (1)
- Woodbury University (1)
- Chapman University (1)
- Vanguard University (1)
- Stanford University (1)
- Scripps College (1)
- Whittier College (1)
- University of La Verne (1)

Out-of-State Universities (9)
- Boston College (MA) (1)
- Ohio Wesleyan University (OH) (1)
- University of Montana (MT) (1)
- Coppin State (MD) (1)
- Pennsylvania State (PA) (1)
- Townsend University (MD) (1)
- Dominican College (NY) (1)
- Northern Arizona University (AZ) (1)
- Grand Canyon University (AZ) (1)

*Enrollment for LIFEvest participants from 2011-2015, 2020-2021
Curriculum Sample

The world is a better place when we invest in our youth. With LIFEvest, we focus on providing one week of full-immersion education and support for high school students from low-income households, who will be the first generation to attend college. Our mission is to equip high school students with the skills to lead in their life, and their community.

**SUNDAY**
- Individual Assessment: Special Intelligence, Heart (values), Abilities, Personality, Experiences (SHAPE)
- Education Pays

**MONDAY**
- Career Exploration
- Introduction to Budgeting
- Build Your Own Budget
- Introduction to Investing
- Building a Portfolio

**TUESDAY**
- Investing
- Hyundai Site Visit
- LIFEvest Presentation Introduction

**WEDNESDAY**
- High School Plan
- Guest Speaker: Burt Slusher
- College Knowledge
- College Planning + Research
- Social Etiquette Dinner

**THURSDAY**
- Portfolio Check
- Retirement Planning
- Credit & Debt
- Guest Speaker: Happiness 360

**FRIDAY**
- Guest Speaker: Money Trees w/ PwC
- LIFEplan Presentations

*From 2022 LIFEvest Week 4*
Mentorship

LIFEVEST ALUMNI MENTORSHIP PROGRAM (LAMP)

UCI Undergraduate student mentors are paired with LIFEvest Alumni to provide:

- **Grade-specific content.** Our steering committee has designed content related to grade level. Mentors and mentees complete milestones that increase our alumni’s college profile competitiveness.

- **Match-based mentoring.** Our alumni are paired by request or by profile matching. This ensures partnerships are committed by relationship or likeness.

- **Community and guidance.** Students who participate in our mentorship program are more likely to attend alumni events & community programs and keep in touch.

- **Virtual and safe program.** We offer the program online through Chronus mentorship software to ensure students are able to benefit from a distance as well. This helps facilitate participation from students who cannot find transportation to Orange County.

LEARN MORE: LAMP.CHRONUS.COM
Nonprofit Partnerships

We have partnered with more than 34 nonprofit organizations* in Orange County. All of our nonprofit partners service underserved youth or have missions to provide higher education for their participants.

20% or 32/155 of our 2022 class were nonprofit affiliated

If your nonprofit group would like to partner with the LIFEvest program, please email ciwm@merage.uci.edu

*All information provided on this page is for the 2022 program year.
Nonprofit Spotlight

Every year, we work with non-profit partners to select students for the LIFEvest program. We partner with organizations whose missions align with our own. Below are the participants who were referred to by our nonprofit partners for the 2022 LIFEvest program year.

**PROJECT YOUTH OCBF**

*Mission: to keep underserved youth in school, healthy, and drug-free through education, counseling, mentoring, and family strengthening.*

- Abran D.
- Alberto C.
- George E.
- Ronnie O.

**TGR FOUNDATION**

*Mission: to provide young people with a clear path to personal excellence and professional success.*

- Adora L.
- Jonathan L.
- Joshua G.
- Kyle C.
- Muskaan S.
- Rubben M.

**SAVE OUR YOUTH**

*Mission: to provide a safe and welcoming space for teens to find hope, nourish a sense of self, promote growth, and develop interests & skills to become productive members of society.*

- Alexa P.
- Betzy Q.
- Crystal M. F.
- Elizabeth E.
- Esa A.
- Heili R.
- Isaias M.
- Jesus C.
- Josselyne L.
- Kimberly R.
- Melanie A.
- Valeria G.

**OPERATION JUMP START**

*Mission: To help low-resourced, high-potential first-generation students get in, stay in, and graduate from a four-year college by providing academic support, mentoring, and exposure to a broader world.*

- Alina N.
- Angelica B.
- Fernando A. J
- Gianluca A. D
- Hy L.
- Joseph V.
- Kevin P.
- Makhia M.
- Miguel C.

*All information provided on this page is for the 2022 program year.*
Corporate Partnerships*

Our Center receives no funding from the state of California or the University of California. It is solely funded by contributions from our corporate sponsors and donors.

For more information about membership including advisory board member features, please visit merage.uci.edu/research-faculty/centers/investment-wealth-management/ciwm-advisory-board-members.html

*All information provided on this page is for the 2022 program year.
Corporate Site Visits

As part of the immersive program week, corporate partners host LIFEvest students at their offices. Visits typically include lunch, speakers, panelists, and a tour. In 2022, LIFEvest students had a chance to visit Capital Group, Western Digital, Hyundai Capital, and Edwards Lifesciences.

"Thank you for giving us a tour of your corporation and what you do. What you're doing is important and is saving lives. Thank you for lending us some of your time."

- Ruby L.
2022 LIFEvest participant

"The company was very diverse and each worker there has their own unique story. I feel more confident now and positive about my future."

- William P.
2022 LIFEvest participant
Corporate Site Visits

As part of the immersive program week, corporate partners host LIFEvest students at their offices. Visits typically include lunch, speakers, panelists, and a tour. In 2022, LIFEvest students had a chance to visit Capital Group, Western Digital, Hyundai Capital, and Edwards Lifesciences.

“ It reminded us that no matter where you come from or your background, you can still have a successful and fulfilling career.”

- Ashley M.
2022 LIFEvest participant

“ Thank you for letting me know I can still find something I love to do even if it’s completely different from what I had planned!”

- Fabiola F.
2022 LIFEvest participant
Involvement Opportunities

Our program depends on the generous donations of both time and treasure. Please take a moment to review the opportunities. Your support helps to deliver financial literacy education and make a positive impact to help the lives of our community’s youth!

**VOLUNTEER SCHEDULE**

<table>
<thead>
<tr>
<th>Sunday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Friday</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assist in check – in stations to ensure a smooth start to the program</td>
<td>Assist students with their LIFEplan Presentation</td>
<td>Participate and engage in the fine art of small talk during the Social Etiquette Dinner</td>
<td>Be a judge for our students’ LIFEplan presentations.</td>
</tr>
</tbody>
</table>

5+ Volunteers       10+ Volunteers       10+ Volunteers       10+ Volunteers

**GUEST SPEAKERS**

LIFEvest participants love hearing about your experiences and areas of expertise! Below are some examples of topics that have been presented in the past.

**UC Admissions** with Burt Slusher, Paul Merage School of Business staff member

**Happiness 360** with Feroz Ansari, CIWM board member

**Money Trees** with PricewaterhouseCoopers (PwC), CIWM board member

**DONATIONS**

- **Snacks:** Granola bars, fruit snacks, crackers, chips
- **Drinks:** Bottled water, fruit juice
- **Miscellaneous:** Disinfecting wipes, paper towels, hand sanitizer
Special Thanks!

Over the past 12 years, LIFEvest has grown from serving students over one summer program week to serving students throughout the summer (4 weeks) and beyond with the inaugural LIFEvest Alumni Mentorship Program. This work is possible thanks to the generous support of our program with your time, donations, and volunteers. Your support makes it possible for our program to be successful and have an influence on our participants with a unique, immersive educational experience.

Our goal is to have a positive impact on our communities through the power of our giving. We can only do this because of the strength of the relationships we have with our nonprofit partners. We are proud to invest in them to support their missions and their passions.

In 2019, the Pacific Life Foundation announced a $2 million partnership with UC Irvine’s LIFEvest Financial Literacy Residential Program.

This grant directly broadened the program’s reach and impact on the Orange County community by providing a grant to fund 3 summer program weeks through Summer 2029.

In 2022, Pacific Life volunteers engaged with LIFEvest by assisting with participants' LIFEplan presentations and hosting all social etiquette dinners.

We believe we can make a transformational, enduring impact by using our position and experience to help increase diversity among financial professionals to better reflect the communities we serve. Therefore, we’ve dedicated resources to helping underrepresented professionals build their practice [by] partnering with firms and universities to increase awareness of career opportunities in financial planning.

In 2021, Capital Group teamed up with UC Irvine to add a 4th program week, increasing the number of students served by 33%. The $300,000 grant will support the addition of a 4th week through Summer 2024.

In 2022, Capital Group* volunteers hosted a site visit, helped with participant check-in, and worked with participants on their LIFEplan presentations.

*Capital Group sponsored LIFEvest Girls Week 3 in 2022
Donate Today

Our program is run solely through the generosity of our donors and volunteers, it is through individual contributions and collective action that we are able to impact the lives of nearly 500 students from Orange County.

Become a part of the change needed among first-generation students and the lower-income community. Every dollar donated allows us to advance our mission of Financial Literacy for all.

Donate online
merage.uci.edu/ciwm

Scan our QR code
Point your cell phone camera at our code to the right to submit a donation via a cell phone browser.

Mail a check

Make the check payable to:
UC Irvine Foundation
Reference Account #3148 B4M73

Mail To:
4293 Pereira Drive, Suite 3400
Irvine, CA 92697-3125

LIFEvest was the very first time I was introduced to the world of professional and higher education. I learned that the business world is interconnected with every field and extremely relevant no matter your career aspirations. The material that I learned in the program has correlated with my work and life experiences. I am forever indebted to the program for being what inspired me to always shoot for a higher level of education and achievement.

Cecilia R.
2019 LIFEvest participant