Where Annual Membership CIWM Support Goes

The Impact

Over thirteen years, the CIWM has positively impacted over 50,000 individuals with its financial literacy programming:

1. Provide professional development and networking opportunities for industry professionals

   Quarterly meetings with professional development programming

2. The design and facilitation of a Women’s Financial Wellness Initiative (new in 2019)

MISSION

Motivate women of every socio-economic standing in Orange County to not only develop financial literacy, but to grow comfortable in their command of money management.

Programs to include:

UCI Womxn* (students and staff/faculty) | LIFEvest Families | SheVest Investment Club

The Center for Investment and Wealth Management at the UCI Paul Merage School of Business organizes events for womxn that provide a safe and private educational environment.

3. Offer Community Educational Programs for Community Members

   2-3 complimentary/low fee events per year
Where Annual CIWM Support Goes (continued)

4. Provide and support the LIFEvest Financial Literacy Program (3 Cohorts per year) for Underserved Teens

   Outreach to 100+ high schools in Orange County
   Work with 15+ social impact/non-profit organizations
   Almost 400 students served since 2011
   76% of our 2011 participants we are in contact with attend college

5. Provide and support the LIFEvest Alumni College-going Programming

   Over half of our alumni participate in twice annual events
   We create and email a monthly newsletter to freshmen, sophomore, junior, senior and college age alumni
   Twice a year Alumni Educational and Recreational Events

6. Supports the LIFEvest Mentorship Program (new in 2019)

   Currently there are nearly 40 LIFEvest mentees and 12 UCI mentors

7. Provides support for the Stock Market Competition (2nd Year) for UCI Undergraduate and Graduate Level Students

   420+ registered this year
   Merage School MBAs and Masters of Finance students can participate and are helping to facilitate the educational workshops

8. Promote and provide Financial Literacy Educational Experiences and Resources for Undergraduate students

   For 4 years now to approximately 4,400 undergraduate students
   Using Cashcourse to help students be more financially literate
Where Annual CIWM Support Goes (continued)

9. UCI Undergraduate Financial Literacy Education through Customized Workshops with over 20 UCI Student Facing Groups or Departments

Ex: “Personal Finance and You”: Workshop during welcome week 2018 taught by Feroz Ansari

10. Provide CIWM Internship Opportunities (20 + a year) for Undergraduate Students

Currently have 22 interns

10 men, 12 women

Majors include: Business Administration, Business Economics, Biology, Public Health Policy, Journalism

11. Provided financial support to help send 3-5 UCI students to the Schwab Impact Conference each year

Over 20 students have participated in the last six years

12. Offer “Investments, Financial Planning and You” High School Program (4th year) for High School Teens

Two weeks will be offered in 2019 because of increased demand

Nearly 100 high school students have participated over the last three years
Undergraduate Student Intern Testimonials

Melissa Silva | Operations Manager

Having worked at the CIWM for over a year now, first as an intern and now as an Operations Manager, I have had many opportunities to involve myself in the Center's impactful work both on and off campus. Contributing to the Center's projects has also allowed me to grow personally in my communication and organization skills. From assisting in the planning and execution of our many speaker events to coordinating advisory board member meetings to working as lead RA during LIFEvest 2018, I have enjoyed my time at the Center, as it has allowed me to connect with inspiring people, learn valuable office and event planning tasks, and make a direct impact on people's lives.

Nicholas Shepherd | Operations Manager

Working at the Center for Investment and Wealth Management as an Operations Manager has provided me with numerous beneficial learning and growth opportunities since I joined as an intern less than a year ago. My time management and task management skills have substantially improved as a result of working in the fast-paced environment here at the Center, leading me to find more success in my academic career as well. However, I've not only found improvement in my professional and academic life but also in my personal life. My self-confidence when speaking with people has grown significantly and that has given me the ability to establish more meaningful connections in my everyday life. I attribute a lot of this to my experiences at the Center interacting with professionals, other students, and people in general. I am very grateful for having the opportunity to work at such a fulfilling organization.