



Algonquin Academy – An Introduction to Wealth Management and to the Workforce for the Next Generation

January 28th, 2020

In early January, Algonquin Advisors held its annual Algonquin Academy in New York City. The full-day event was designed to provide college students with insights into the world of wealth management, as a career choice or as a consumer. This year's event included dynamic attendees from all over the country representing esteemed institutions of higher education such as Barnard, Claremont McKenna, Cornell, Denison, Hobart & William Smith, University of Pennsylvania, University of Richmond, and William & Mary. Algonquin Academy was hosted by Cohen & Steers in their midtown Manhattan corporate headquarters.

The interactive program featured a mixture of presentations, panel discussions, fireside chats with industry leaders, breakout groups and, intensive one-on-one mock interview sessions. The focus was to provide real world experience and practical information about the wealth management industry in a fun, open and collaborative environment. Algonquin Academy program sessions included:

- Wealth Management Investment Process
- Breakout case study – Planning for the Ascending Professional Athlete
- Introduction to Private Markets Investing
- Fireside Chat with Venture Capital investor, Nihal Mehta
- Cohen & Steers career path panel discussion
- Speed Interviewing and Resume Review
- Not Your Parent's Investment World presentation

The attendees appreciated the real-world practical engagement and provided supportive feedback on the fun and interactive day:

- “The professional athlete case study was most useful because it felt like you were in a management team, coming up with questions and steps to gain the most information to make a holistic decision/strategy.”
- “The speed interviewing portion was the most useful for me because it forced me to start preparing for summer analyst interviews and gave me great experience speaking concisely, making eye contact, and learning more about Algonquin in a one-on-one setting.”
- “Resumes can almost always be improved upon and the tips were very helpful.” ... “To create a narrative of your life in your resume, such as emphasizing that you are hard-working or good at dealing with people.”
- “[I derived] the greatest benefit from the tips for starting a career in wealth management and being able to talk in a casual setting with those in the field.”



- “I learned how to answer the ‘biggest weakness question’ and how to dive deeper into my [personal] stories. It was important because interviewing is critical for any job.”

Algonquin feels that events like Algonquin Academy are important to allow the firm to contribute meaningfully to its community and help future wealth management career candidates gain a head start on what it takes to deliver a superior investment experience to clients. In addition, programs like this help the next generation become more knowledgeable and thoughtful consumers of wealth management and investment advisory services.

About Algonquin

Algonquin was founded in 1998, Algonquin Advisors is a leading and innovative independent investment counselor. Algonquin provides sophisticated solutions to a select group of wealthy individuals, families, foundations, endowments, financial institutions and other entities with investable assets in excess of \$5 million. Located in Greenwich, Connecticut, the firm is an employee-owned Registered Investment Adviser. An objective and independent advisor, with buying power and advanced capabilities, Algonquin is a leader in providing complete solutions to serve the unique needs of our clients.

Algonquin’s mission is to deliver a superior investment experience to our clients, provide rewarding career opportunities for our team, and contribute meaningfully to our community.