

# EXECUTIVE IQ™

**Educating  
today's leaders  
for tomorrow's  
opportunities.**





# The executive-level professional accelerator for investment leaders looking to advance their careers and their organizations.



Limited to select senior leaders with 10-15 years experience



18 months  
10 hours per month



University of Virginia  
Darden School  
of Business Certificate



Online, In-Person & Hybrid

\*In-person events are tentatively scheduled for 7/2021 and 1/2022 with a hybrid virtual delivery option.

## Designed for tomorrow.

Tomorrow's financial services industry is complex and facing disruption. Executive IQ helps transform experienced decision-makers into innovators who adapt to industry disruption and challenges to find new opportunities. They'll access the leadership skills necessary to grow their organizations today and build high-level networks alumni can count on for the future.



For select leaders

# Exclusive executive education.

Limited to select senior leaders, this exclusive 18-month certification combines university-backed curricula with real-world case studies from the industry's most prestigious consultancies and Fortune 500 companies. This flagship program makes the industry the classroom, and every participant's experience an essential part of the program.



The Executive IQ difference

# What makes Executive IQ unique?



## Executive-level curriculum

Explore executive-level educational content from University of Virginia Darden School of Business.



## Real-world application

Access real-world case studies and seminars presented by Fortune 500 companies including PwC and Microsoft.



## Network IQ

Connect, learn and grow your network with high-level executives from the world's leading financial institutions.



## Innovation expertise

Develop the skills necessary to become a transformational leader.



## Immediate impact

Drive change with actionable takeaways for real-time application, leadership coaching and support.

# Direct access to world-class content and industry leaders

In collaboration with the University of Virginia Darden School of Business, the program delivers a world-class education over the course of 18 months. Executive IQ offers exclusive access to the investment world's most prestigious consultancies and Fortune 500 companies like PricewaterhouseCoopers and Microsoft.



# Real-world challenges.

Executive IQ provides the hands-on education, real-time skills and tools for senior leaders to make an immediate impact on their organization.

It's a roadmap for business leaders to effectively navigate change and to inspire and build a culture of innovation within their teams.



## What leaders need

# Turning uncertainty into an asset.

The speed, scope, and nature of disruption facing businesses is unprecedented. To tackle these challenges, leaders must apply a fresh approach—using innovation to identify and execute on new opportunities.

Future growth opportunities will increasingly emerge outside a company's traditional business. Change management is often the most challenging part of any transformation.

Executive IQ provides a toolkit of skills to jumpstart innovative thinking. By helping activate a pioneering mindset in senior leaders they will in turn foster a culture of innovation, inclusion and collaboration needed inside firms in the next decade.

## Network IQ

Executive IQ's cohort of diverse, senior leaders and their varied experiences are an essential part of the course, providing an inside look at best practices and laying the foundation for a network of knowledge to tap into.

We call this "Network IQ." It transforms experienced decision-makers into a network of mutual support, giving back, and information-sharing that participants can count on through ongoing events and collaboration.

Leadership education program

# Enter the LEAP Lab.

At the core of the program is  
MMI's unique four-pillar approach  
to academic development.

Leaders maximize skills in these areas:

## Leadership

through critical-thinking exercises, self-examination, and lessons from industry professionals.

## Engagement

through effective communication tools, team coaching, and diversity and inclusion.

## Advancement

in the face of constant change through best-practice frameworks and critical change management skills.

## Pioneering

traits to create value for their organizations—like staying inspired, detecting and embracing trends and more effective collaboration skills.

# More than education. Acceleration.

Combining virtual and self-paced learning with live events, the curriculum is tailored to the unique challenges faced at the executive level and ensures participants can bring tomorrow's innovations to their organizations today.

 <p><b>In-person, faculty-led Sessions</b></p>	 <p><b>Digital course content</b></p>
 <p><b>On-the-job application</b></p>	 <p><b>Independent and team project work</b></p>
 <p><b>Coaching &amp; assessment</b></p>	 <p><b>Case studies, active learning &amp; business simulations</b></p>
 <p><b>Sponsors</b></p>	

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## Program Timeline

Cohort 1: January 2021-July 2022

- Quarter 1**
  - Digital Launch
  - Personal Assessment 1
  - Coaching Session
- Quarter 2**
  - Digital Course
  - Sponsor curriculum (Microsoft/PwC)
  - Personal Development Plan
- Quarter 3**
  - 2-Day faculty workshop 1
  - Innovation work
  - Coaching Session
  - Personal Development Plan
- Quarter 4**
  - Sponsor curriculum (Microsoft/PwC)
  - Sponsoring Session
  - 2-Day faculty workshop 2
- Quarter 5**
  - Innovation work
  - Personal Assessment 2
  - Sponsor curriculum (Microsoft/PwC)
  - Sponsoring Session
- Quarter 6**
  - 2-Day faculty workshop 3
  - Final Coaching Session



Established in 1997, the Money Management Institute (MMI) is the industry association representing financial services firms that provide financial advice and investment advisory solutions to investors.

Through conferences, educational resources, and thought leadership, MMI facilitates peer-to-peer connections, fosters industry knowledge and professionalism, and supports the development of the next generation of industry leadership. MMI member firms are dedicated to helping individual and institutional investors, at every level of assets, plan for and fulfill their financial goals.



PwC's professional services, including audit and assurance, tax and consulting, cover such areas as cybersecurity and privacy, human resources, deals and forensics. We help resolve complex issues and identify opportunities across these industries.

For decades, asset and wealth management clients have relied on PwC to help shape their businesses. Our continued investments in people, processes and technology are enabling us to reshape our clients' futures, allowing you to move with confidence, raise expectations and outpace change.

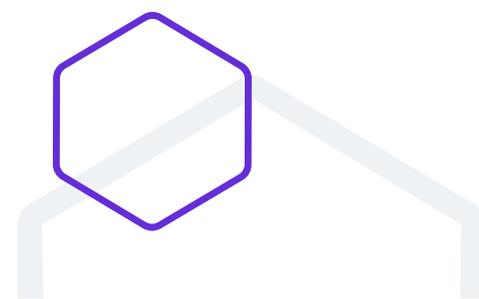


Darden Executive Education is a top-ranked, global provider of executive development. Delivered by the University of Virginia Darden School Foundation and taught by the Darden School of Business' highly acclaimed faculty, Darden Executive Education prepares and inspires leaders to succeed through transformation and disruption in a global marketplace.

Offering more than 30 open programs and partnering with leading organizations worldwide to develop custom business solutions, we provide personalized, transformational learning experiences at our locations in Charlottesville, Virginia, and the Washington, D.C. Metro area, as well as online. Darden shapes the way the world does business through our research and draws upon our collective knowledge and experience to cultivate responsible, innovative leaders.



At Microsoft we are dedicated to advancing human and organizational achievement. Our mission is to empower every person and every organization on the planet to achieve more. We are putting our principles into practice by taking a people-centered approach to the research, development, and deployment of Artificial Intelligence ("AI"). To achieve this, we embrace diverse perspectives, continuous learning, and agile responsiveness as AI technology evolves.



# Are you ready to raise your Executive IQ?

## Who Should Apply?

Investment industry professionals with a minimum of 10-15 years' experience who are open to a transformative 18 month learning experience.

Limited to select participants, the program is intentionally diverse, representative of multiple functions and points of view. Participants all have rich work experience, including P&L responsibility, a record of high achievement and passion to advance management practice and make a broader impact in their organizations and the industry.

## Selection

Leaders chosen to take part in this program have the opportunity – and responsibility – to share what they've learned and to serve as influencers to the industry. Participating leaders will be drawn from a broad mix of organizations and backgrounds. This diversity is an essential part of the experience.

## Apply

The application for the Executive IQ inaugural cohort is now open.  
Apply by December 4, 2020 for the program beginning in January 2021.

**Visit [mminst.org/executiveiq](https://mminst.org/executiveiq) to apply.**