



Developing the Female Investment Professionals of the Future

DIVERSITY PROJECT

P>THW>Y

diversityproject.com





Application Process

Requirements For Applicants

We suggest each participant has:

3+ Years job experience

- Ensures candidates can fully benefit from the programme
- Prior cohorts have ~7 years experience

CFA® or similar Qualifications

- Should have **achieved or be on course to achieve CFA or equivalent qualifications** (e.g. IMC, CISI, CAIA, CFA) or are committed to take similar qualifications in the near future (and are supported by their firm to do so)
- *(PM Track only)* Participants without existing qualifications will be required to attend a 3-day technical “bootcamp” in November 2024

Background

- The aim is to **create a diverse and inclusive cohort of women** who wish to become portfolio managers or traders
- They may or may not already be working within an investment team
- Others from different areas such as research, sales and trading, investor relations, legal, etc. who have talent or have expressed interest in switching careers to fund management or trading are welcome

On the job training

- Crucial **on-the-job training, arranged and provided by her own firm**, plus any other additional initiatives that the participant firm deems important

Sponsor

- **Each participant must have her own sponsor in the firm**, as they are a critical part of the programme
- The sponsor will champion, advise and identify progression opportunities for their participant
- Ideally, the **sponsor should not be the participant's line manager** (and can, of course, be male or female)



What is expected from the participant?

The 12-month programme requires a time commitment of approx. 100 hours plus travel to/from event locations.

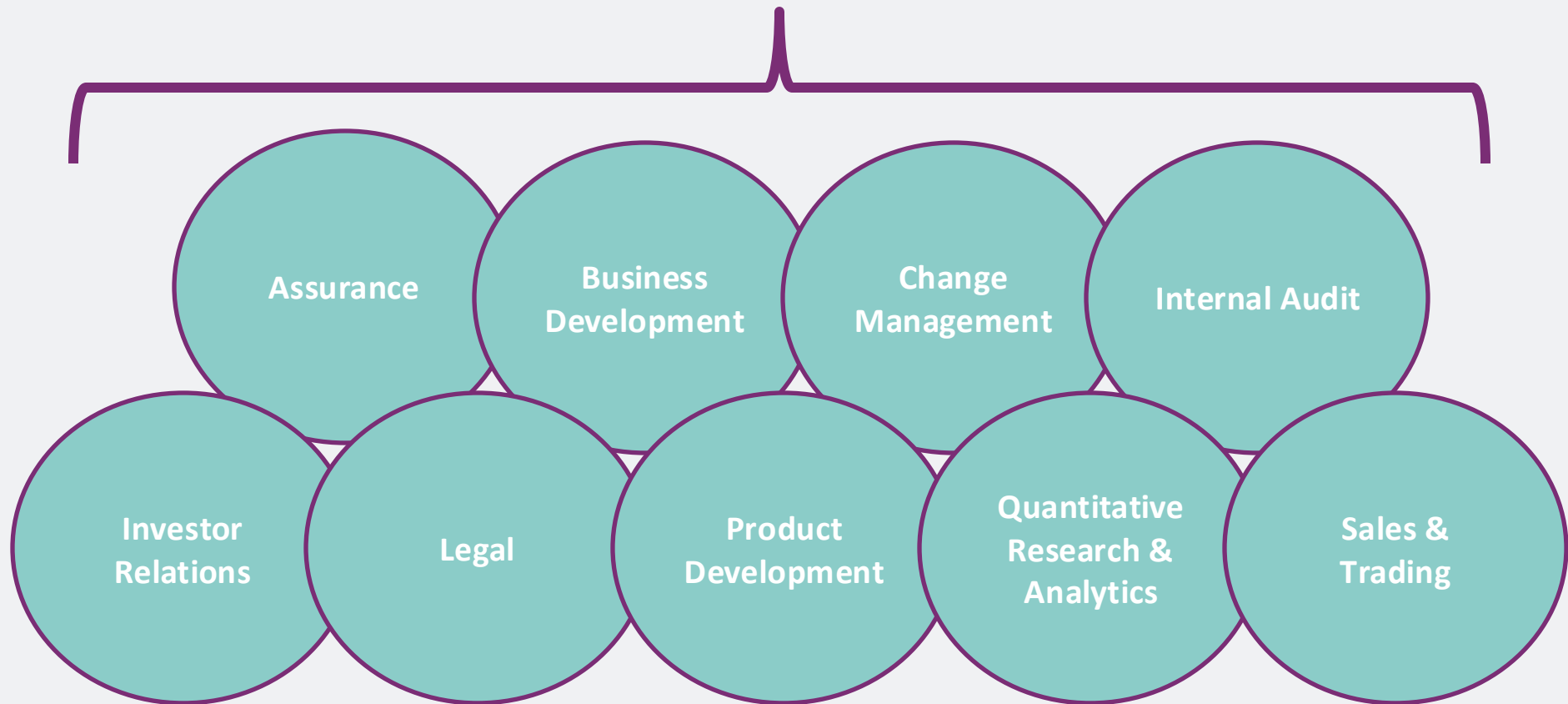
We expect all participants to:

- Attend a minimum of two-thirds of the sessions live, in person or virtual
- Engage with sponsor, ideally monthly, to discuss progress and learnings
- Prepare for each session by reading the pre-read materials
- Actively participate in sessions by contributing her experiences and asking questions
- Engage with assigned “buddy group”
- Develop Career Development Plan
- Provide feedback to improve the curriculum and experience
- Pay it forward to the next generation of women in our industry
- Bring her energy and enthusiasm to the programme!



Background/roles of previous cohorts

- 62.5% of participants work in an **investment team**.
- The remaining participants come from:



Role Of The Pathway Sponsor

Their support and involvement are key to the programme's success

- Mentor and champion the participant (monthly catch-ups over the year) both during and after the course is completed
- Advocate for her where the opportunity arises
- Attend events targeted at both participant and sponsor (approx. 5 per year) and the sponsor sessions
- Guide her through additional resources and materials that exist within the firm that can be accessed to further her development and progression
- Discuss session content and help put information into context for their own firm and team
- Support participant through discussions around her Career Development Plan
- Provide feedback to the participant AND to the Diversity Project



Application And Selection Process

Firms to complete an online application form to propose their candidates

- Each firm can **select up to 3 participants**.
 - If a firm would like to enter more than 3 participants, please email shyla@diversityproject.com to discuss this possibility
- We aim to have **80 participants on the Portfolio Management Track** and **10 participants on the Trading Track** – with a combination of investment and non-investment backgrounds
 - We suggest firms look widely into their talent pool, beyond investment teams, and consider women who have the skills and interest to be future Portfolio Managers or Traders.
- We have learned, from prior years, that **firms who have taken greatest care in their selection process have put forward candidates who are more engaged and committed**. Examples of great selection processes include:
 - Promoted the programme internally across the organisation and allow women to put their names forward (instead of selecting behind closed doors)
 - Candidates explained their rationale of why they should be chosen for the programme
 - Candidates underwent a numerical assessment to determine their skillset
 - Candidates underwent an internal selection and interview process



Key Dates For Firm Applications



June

Zoom information sessions for firms would like to find out more about the 2025 Pathway Programme



Jun-Sep

Zoom information and Q&A session for all candidates and potential participants to learn more about the programme.

This will help women make the decision whether they should apply to the programme or not



13th September

Deadline for submission of application forms by firms, including details of candidates put forward and their programme sponsors



27th September

Deadline for submission of individual candidates' application forms



Late October

Successful participants announced

Information call with future programme sponsors

Deadline for payment of Pathway Programme invoice



November

Participants to attend in person pre-launch event

Participants in Portfolio Manager track with non-investment background to attend a 3-day technical "bootcamp" training (dates TBC)

Programme to officially commence in January 2025





Key Contacts

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#ClosingThePMGap

#FutureFemalePM

#WhatWorks

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