



WEALTH MANAGEMENT SYMPOSIUM

Career Insight From the Industry's Top-Ranking Financial Professionals

Treasury Partners is a 14-time Barron's ranked Registered Investment Advisor group of 20+ professionals based in NYC. With a collective 120 years of industry experience, our team serves an exclusive clientele that ranges from private investors to Fortune 50 companies.

We conduct a series of one-day seminars to introduce a select group of students to the financial advisory profession and career opportunities in the wealth management industry.

Unlike most other academic programs, this interactive symposium is designed to provide students with:

- An overview of career alternatives within the financial ecosystem, and an understanding of the advisor's role within it
- A detailed review of a financial advisor's responsibilities and tasks
- Core competencies & specialties advisors are expected to demonstrate, and skills required to succeed
- A case study covering asset allocation

Key Statistics*



Over the past decade, the number of financial advisors has decreased from 340,000 to 300,000



43 percent of these advisors are over 55 and rapidly heading towards retirement



Household net-worth has soared to a record \$84 trillion



Individuals age 55 and over hold more than 50 percent of these assets



A massive transfer of wealth will take place over the next two decades

“ The wealth-management industry is facing an old-age problem: a shortage of young blood joining the ranks of advisers. But Richard Saperstein, principal of HighTower Treasury Partners, which manages about \$8 billion in assets for clients and institutions, is looking to change that. ”

— *The Wall Street Journal* in attendance at the Winter 2017 Symposium

Our Collegiate Network:



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To Apply:

[Click here](#) or email your PDF resume to Helene Thumen at hthumen@treasurypartners.com. Please include your date of birth and major in the body of your application email.

Especially appreciated your insights on the qualities needed to succeed as a financial advisor.

–BRAD, ACCOUNTING MAJOR

Can't thank you enough. You've opened my eyes to brand new career possibilities.

–SARAH, BUSINESS MAJOR

I really appreciated the opportunity to participate and, because of the way you've structured things, I do mean participate.

–JOE, MBA CANDIDATE

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* The Wall Street Journal TV

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