



ANNUAL
REPORT

2022

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EMPOWERING THE NEXT GENERATION OF FINANCIAL LEADERS:

A CALL TO TRANSFORM TOGETHER



At the heart of the Greenwood Project's mission lies a powerful vision; a financial services industry where doors are open wide, and pathways to success are unobstructed for Black and Latinx students. As we reflect on our journey and look ahead, I am filled with excitement to guide this organization to realize its potential.

My own journey, shaped by a rewarding career in global equities, has ignited a fervent dedication within me. I am driven to pass on the torch of knowledge and enthusiasm for the financial services industry to an emerging generation of talented individuals. As we unite our efforts, we are committed to nurturing our students' growth, ensuring they are equipped with the tools to thrive in this dynamic field.

Our progress is not possible without acknowledging the steadfast support of our donors. Even amidst economic uncertainties, your unwavering dedication to the cause of empowering Greenwood Project Scholars is nothing short of extraordinary. Your generosity fuels our growth and prepares our Scholars. Your multifaceted roles as mentors, panelists, judges, donors, and advisers are the cornerstone of our collective success.

Our commitment takes three crucial forms:

- **Academic Capital - Excellence that Empowers:** We stand unwaveringly dedicated to equipping our students with the academic prowess that industry leaders seek in their top candidates. Through rigorous preparation, we instill the confidence and expertise that will propel them to new heights.
- **Aspirational Capital - A World of Possibilities:** Every student deserves to know that a place in the financial services industry is not only possible but attainable. By nurturing aspirational capital, we encourage our students to break through perceived barriers, inspiring them to aim for greatness in a challenging and competitive industry.
- **Social Capital - Networks that Nourish Success:** Building a prosperous future demands more than just individual effort –it requires a community of support. We guide our Scholars in cultivating their own networks of industry mentors and allies, forging connections that support and uplift them throughout their journeys.

As we embark upon a new year, brimming with fresh opportunities and a new cohort of eager Scholars, I extend a heartfelt invitation -- *Join us as we transform the face of the financial services industry.*

Together, we transform dreams into reality, barriers into bridges, and aspirations into achievements. Thank you for standing with us on this remarkable journey of empowerment and change.

With Sincere Gratitude,

Kwesi Smith

THIS IS US

01

WHAT WE DO

Introduce Black and Latinx high school and college students to careers in finance through rigorous training and internships.

184

Program
Scholars

100%

increase in
Finance Knowledge

70%

of Scholars work in
Financial Services

02

OUR PARTNERS

Partners aren't just supporters; they're the lifeblood of our mission. They fund our work and provide transformative opportunities through internships. Partners rely on us to achieve their long-term diversity, equity and inclusion goals.

41+

Corporate
Partners

170

Active
Volunteers

76

Participating
Colleges & High Schools

03

OUR SCHOLARS

Our scholars are Black or Latinx. For many, adversity is a backdrop, but they rise as first-gen college students and unconventional candidates. Their education and career paths are profoundly bolstered by Greenwood Project's initiatives. Most students are from Chicago.

53%

First-Gen
College Students

75%

of Scholars
are underserved

99%

of Scholars identify
as Black or Latinx

EDUCATION

College Program

Greenwood Project's College programs provide rigorous training and work experiences for students across multiple years of their College careers. After a four-week intensive boot camp covering professional skills, accounting principles, and the basics of financial markets and valuation, students move into six-week internships at partner companies across the Financial Services industry. Upon completion of their summer training, students pursue traditional ten to twelve-week internship placements. Throughout their engagement with the Greenwood Project, students meet and interact with over 170 corporate volunteers and professionals.



High School Summer Financial Institute

Chicagoland High School Students are immersed in an intensive six-week program that combines financial and technical education with extensive exposure to careers in the Financial Services industry. Students meet and interact with corporate volunteers and learn firsthand about their companies, their roles, and various career pathways into the industry.

High School Summer FinTech Institute

FinTech is transforming the Financial Sector. At the FinTech Institute, high school students learn professional skills, get an introduction to coding, and practice basic functions of the programming language Python. Students complete mini projects where they apply their coding skills to complete basic financial analysis. The program culminates in a final presentation where students write code to analyze market data and create an investing strategy based on their analysis.

GREENWOOD PROJECT

RECOGNITION



Investment All-Stars

\$250,000+

Cboe*
Citadel
Janus Henderson*

\$100,000+

Boeing
DRW
Piper Sandler
William Blair*

\$50,000+

BMO
Charles Schwab
CME*
Mesirow
Morgan Stanley

Neuberger Berman
Nomura
Societe Generale
UBS

*multi-year commitment

Corporate Supporters & Internship Providers

ABN Amro
Alyeska
APEX Clearing
Belvedere
Bloomberg
Camping World
CFA Society of Chicago
Cleveland Avenue
CoBank
Community America
CTC Trading Group
Deutsche Boerse

Evestnet
Federal Reserve Bank of Chicago
Fidelity Investments
Firstrate
Gigwage
Goldman Sachs
IG
Instinet
Invstr
Marex
Mizuho

Nasdaq
National Futures Association
Northwestern Mutual
OCC
Option Pit
PEAK6
Qarik
Stockpile
T3
Vivaldi Capital Management
Wellington

RECOGNITION

Volunteer All-Stars

Aj Gallagher
Altruist
Alyeska Investment Group
BDT Capital Partners
Bank of America
Belvedere Trading
BGC Partners
Bloomberg
BMO Harris
BMO Wealth Management
Cboe
Charles Schwab
Citadel Securities
CITI
CME Group
CoBank
Cresset Capital
DailyFX
Deutsche Boerse
Duff & Phelps Investment Management
DWS
Emory Decatur Hospital
Envestnet
Esusu Financial
Ever.Ag

FactSet
Federated Investors
Federal Reserve Bank of Chicago
Fitch Ratings
FMX Futures Exchange
Forefront Communications
FRBC
Futures Industry Association (FIA)
Goldman Sachs
Grant Thornton
Harris Associates
HFR Investments, LLC
IG Group
Illinois State Treasurers Office
Intercontinental Exchange
Janus Henderson
JP Morgan Chase
Kula Investments
LendingPoint LLC
MetroSquash
Mesirow
Microsoft
Morningstar
National Futures Association
Nasdaq

Neuberger Berman
NMB Strategic Consult LTD
Nduawastan LTD
Nomura
Northwestern University
Old Mission
P3 GmbH
Peak6
Penserra
Piper Sandler
Quantitative Brokers
Readystate Asset Management
SAP
Silicon Valley Bank
Smith & Feijoo LTD
Societe Generale
The Chicago Community Trust
The Options Clearing Corporation
UBS
University of Chicago
Vivaldi Capital Management
Voya
Western Asset
William Blair

Associations, Coalitions & Foundations

Carolina Security Traders Association
Chicago Urban League
Fintech in Action
Futures Industry Association
Glasser and Rosenthal Family Foundation
Julian Grace Foundation
Sebastian Family Charitable Foundation
Security Traders Association
Social Venture Partners
St. Paul & Minnesota Foundation

GREENWOOD PROJECT

RECOGNITION

High Schools

Adlai E Stevenson
Back of the Yards IB High School
Chicago Bulls College Prep
Chicago High School for Agricultural Sciences
Chicago Hope Academy
Chicago Math and Science Academy
CICS Loomis-Longwood
CICS Northtown Academy
Cristo Rey Jesuit High School
De La Salle Institute
Fenwick High School
Francis W. Parker High School
Gary Comer College Prep
Golder College Prep
Holy Trinity High School
Intrinsic Schools

ITW Speer Academy
J. Sterling Morton West High School
Jones College Prep
Kenwood Academy
Lane Tech High School
Lincoln Park High School
Lindblom Math and Science Academy
Loyola Academy
Mansueto High School
Morgan Park Academy
Mother McAuley Liberal Arts High School
Muchin College Prep
Naperville North
Northside College Prep
Perspectives Charter Schools - Rodney D. Joslin Campus

sPhoenix STEM Military Academy (PSMA)
Pritzker College Prep
Rauner College Prep
Regina Dominican High School
Rowe Clark Math and Science Academy
Senn High School
Saint Patrick High School
Steel City Academy
Streamwood High School
The Noble Academy
UIC College Prep
Walter Payton College Preparatory High School
Whitney M. Young Magnet High School

Colleges & Universities

Bradley University
Brandeis University
Brown University
DePaul University
Elmhurst University
Florida A&M University
Harold Washington College
Howard University
Knox College
Lehigh University
University of Illinois - Springfield

University of Illinois - Urbana Champaign
University of Michigan
University of Notre Dame
University of Pennsylvania
Wharton School
University of Southern California
University of Texas at Dallas
University of Wisconsin - Madison
Virginia State University
Washington University in St. Louis
Wilbur Wright College

Northern Illinois University
Northwestern University
Pitzer College
Pomona College
Purdue University
Richard Daley College
Saint Xavier University
Stanford University
Univeristy of California - Santa Cruz
University of Illinois - Chicago



GREENWOOD PROJECT

PEOPLE

Staff



Kwesi Smith
Executive Director



Emily Holthaus
Director of Education



Diane Rand Rodriguez
Director of Partnerships



Ashley Okonta-Mathews
Manager of Curriculum
& Learning Pathways



Aryana Carreras
Program Associate



Maren Plato
Executive Assistant

Board of Directors



Sizwe Kamara, Morgan Stanley
Director of The Board



Mike Rothkopf, PEAK6
Treasurer



Erika Kingetsu, Morgan Stanley,
Secretary



Sulin Ba
Driehaus College



Catherine Clay
Cboe



Angela Jones
UBS



Alfarida Mohammed



Michael Piper
Piper Sandler



Mark Sebastian, OptionPit

CONTACT US

To discuss becoming an invested partner for the program year, please reach out to:

partnerships@greenwoodproject.org

We thank you for your continues support in our efforts to create career pathways in Financial Services for Black and Latinx high school & college students.



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