



osaic
CUNNECTED

SAN ANTONIO, TX || SEPTEMBER 14 - 17

FOUNDATION MISSION

Bringing Osaic financial professionals and employees together to positively impact communities across America

2025 Osaic Foundation Board & Officers



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Strategic Enterprise
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Operations, Osaic



Carolyn McKinley
EVP
Sr. HR Business Partner, Osaic

Assisting the Board: Patrick Brennan, Executive Director; and Josh Dunford & Jennifer Vawter, Assistant Secretaries

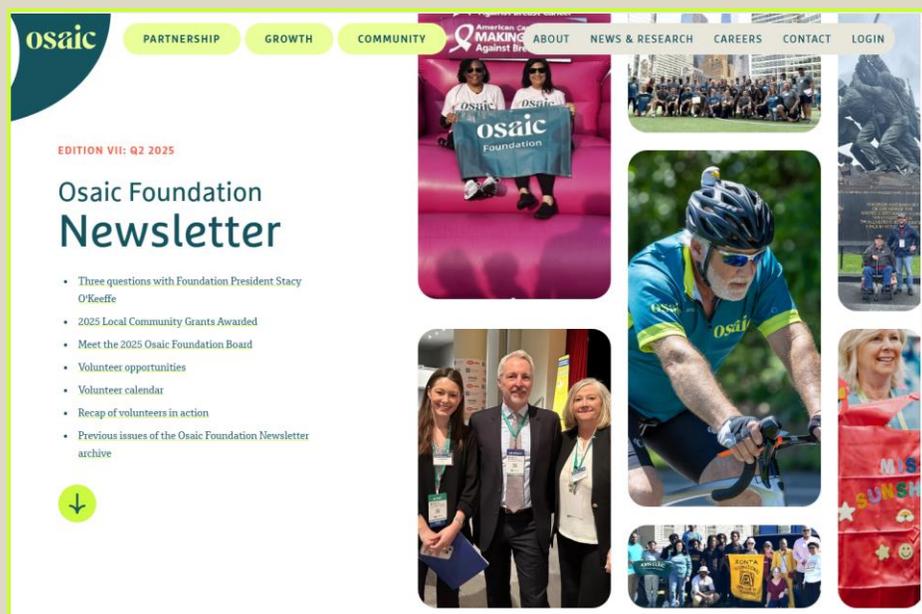


“Never doubt that a small group of thoughtful, committed citizens can change the world; indeed, it’s the only thing that ever has.”
Margaret Mead



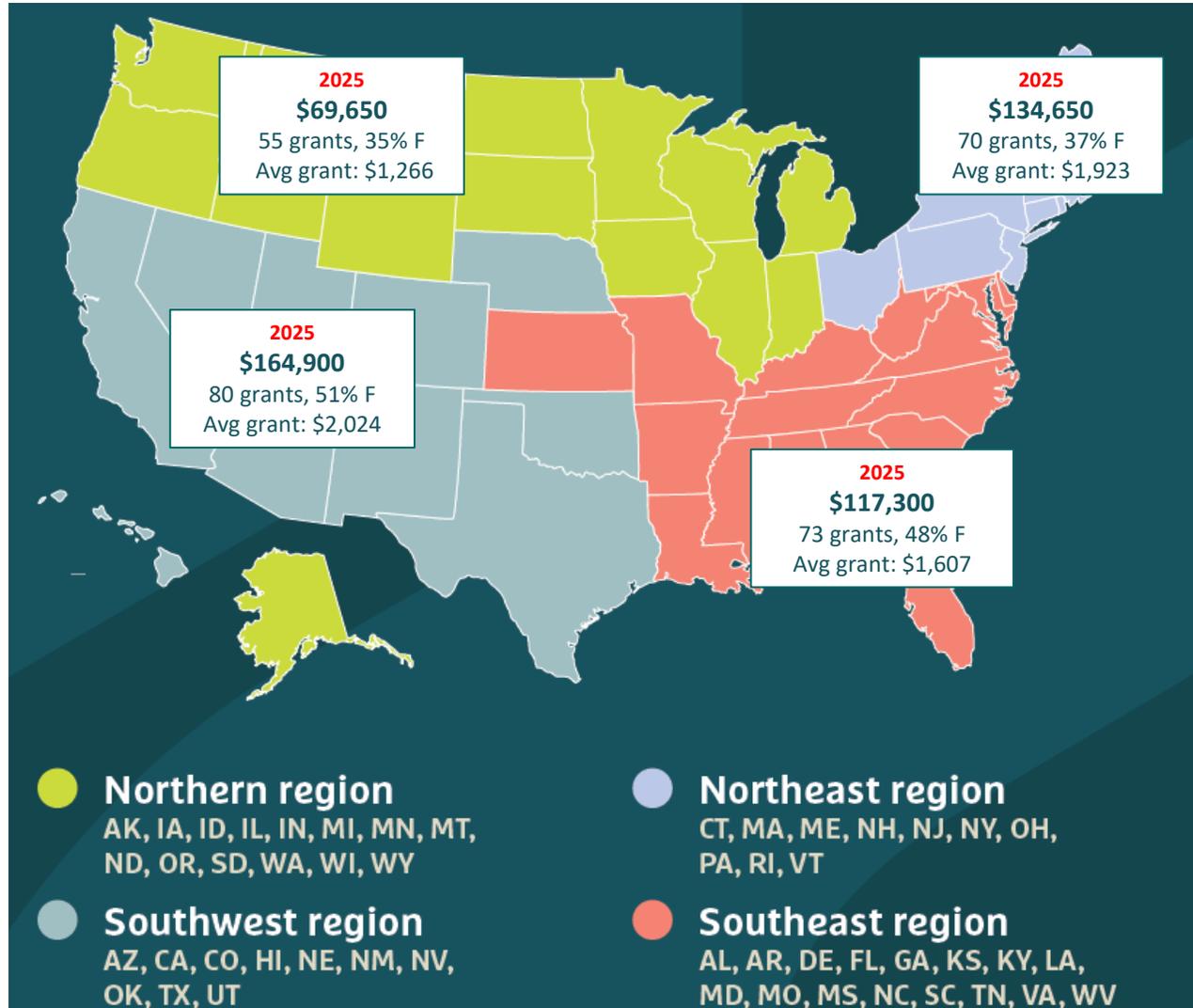
16 Major Program Areas:

- Collectively address 3-part Foundation goals:
 - **Empowering Lives...** Through experiential events that build thriving communities
 - **Education...** With a focus on financial literacy
 - **Increasing Diverse Representation...** Through workforce development



<p>Virtual Enterprises International (VEI)</p> <p>Regional speaker and judging opportunities for high school students on financial literacy and business plan skills.</p> <p>NYC-area help especially needed for our Apr. 7-8 Youth Business Summit at the Jacob Javits Center. Contact us to learn more.</p> <p>2024 Highlight Video →</p>	<p>Regional Cycling Challenges</p> <p>Join our Face of America Regional Cycling Challenge riding alongside veterans and adaptive athletes.</p> <p>Participate in our May 16-18 two-day ride from Arlington, Va., to the battlefields of Gettysburg.</p> <p>2023 Video Highlights →</p> <p>Learn more →</p>	<p>Honor Flight</p> <p>Identify regional opportunities to engage advisors and employees in welcoming veterans.</p> <p>2023 Highlight Video →</p> <p>Honor Flight Committees →</p> <p>Learn more →</p>	<p>Disaster Relief Response Team</p> <p>Develop protocols and response parameters to aid an employee or advisor affected by a natural disaster. Contact us to learn more.</p>
GROUP VOLUNTEER OPTIONS			
<p>SEO Scholars Mentoring Program</p> <p>NYC-area speaker and judging opportunities for HS students on financial literacy and business.</p> <p>Learn more →</p>	<p>Pathways to Financial Literacy...</p> <p>Mentor a young adult creative entrepreneur. The commitment is 1-2 times per week to be done by Zoom. Contact us to learn more.</p> <p>2023 Highlight Video →</p>	<p>WP Carey Financial Literacy Program</p> <p>Phoenix speaker and judging opportunities for high school students on financial literacy.</p> <p>Learn more →</p>	<p>NAACP Financial Literacy Program</p> <p>Atlanta speaker and judging opportunities for high school students on financial literacy.</p> <p>Learn more →</p>
SINGLE VOLUNTEER OPTIONS			
<p>SIFMA Foundation Financial Literacy...</p> <p>Remote judging opportunities for high school students on financial literacy and business.</p> <p>Learn more →</p>	<p>FSI Financial Literacy Program Support</p> <p>Downloadable "Empowering" financial literacy presentations, videos and talking points to use in volunteer speaking opportunities.</p> <p>Learn more →</p>	<p>Feeding America</p> <p>Annual fundraising and site collection during pre-Super Bowl Week. VIRTUAL OR HANDS-ON OPTIONS</p> <p>Back 2 School America</p> <p>Annual fundraising and office hours during the summer months.</p> <p>Learn more →</p>	
FREE FIN LIT RESOURCES			
VIRTUAL OR HANDS-ON OPTIONS			

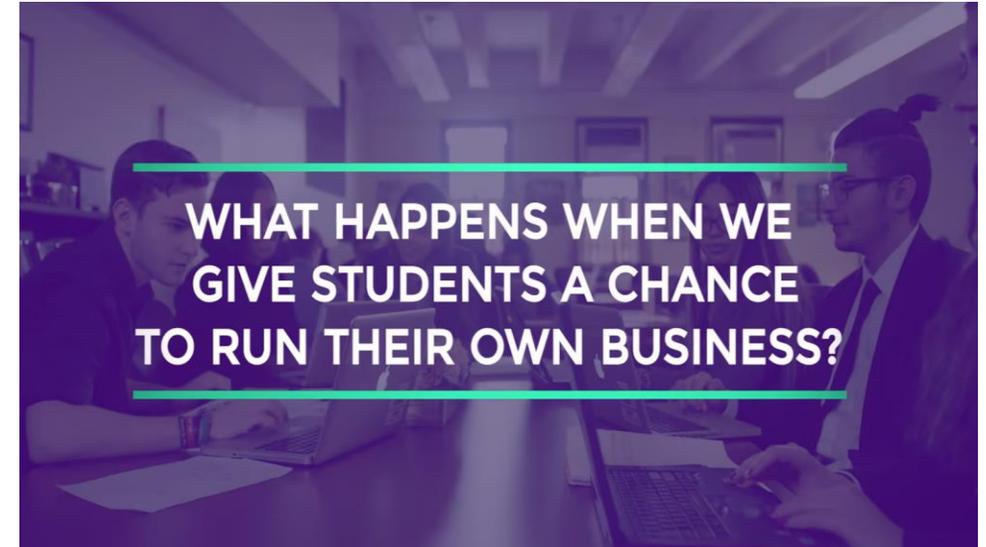
Elevating *Your* Impact: Grant Program



- Nearly **\$500,000** in grants awarded to **288 charities**
- The Foundation spread out this year's grants to charities in **231 communities** in **37 states**, more than \$67,000 in additional funding than 2024.
- The grants were distributed to multiple **health and human service organizations, education initiatives, arts & cultural activities, and civic service groups**

About Virtual Enterprises

- Driven by students
- Develops independent learners
- Opportunity to take risks
- Develop workplace skills
- Ongoing support and training for facilitators and students



Ways to Get Involved with VE



Judge Local Competitions

Use your industry experience to give our students valuable feedback as a competition judge. Competitions take place across the country and test students' professional, presentation, and research skills.



Mentor Classrooms

Give students real-world insights by serving as a business mentor at one of the 400+ schools near you. Mentoring a class offers a flexible schedule and offers volunteers a meaningful opportunity to connect with our students.



Judge Online Competitions

Can judge from the convenience of your office or home! VE offers a wide range of competitions. Competitions include:
Business Plan Competitions
Marketing/Finance/HR Competitions

Find VE volunteer opportunities at:
veinternational.org/events



Face of America Cycling Challenges



World T.E.A.M. rides in support of disabled veterans. Join Team Osaic in Scottsdale and Gettysburg to ride or cheer along side the riders



**Your Voice.
Your Impact.
Our Communities.**



***Bella Krug Wagner
David Peterson***





Get Involved!

Visit the Osaic Foundation Booth #722 to learn more and get engaged!



Volunteering

Local events

October “Making Strides” Across America Osaic teams
VE Local School Districts Financial Literacy

National events

January 31st World T.E.A.M. ride in Scottsdale
December VE “Winning Women” in New York City
April VE National Business Contest in New York City
Honor Flights scheduled at various times



Charity

Annual Local Community Grant Program opens in March 2026
Disaster Relief grants available as needed
Participate in any of our Sub-Committees

Osaic