

Leadership Accelerator at Bernstein

Learning sound financial skills provides individuals a foundation for happiness, stability, and independence, as well as a framework for dealing with future financial challenges and opportunities. At Bernstein, we focus relentlessly on providing the means for future generations to preserve and steward the wealth they earn or inherit. To accomplish this, we prioritize education across a range of subjects such as personal finance, investing, trust and estate planning, and family values discovery, among others. We believe establishing this foundation today helps prepare rising generations for the responsibilities of managing wealth. The Leadership Accelerator at Bernstein brings these topics to life in a manner that is both accessible and critically relevant to students' lives.

Our Approach

Teaching the rising generation about money and wealth is complex, and there is no one right way to do it. Our Leadership Accelerator was designed with two goals: to ensure students get the very most out of each course, and to introduce them to a cohort of peers and experts that offer a springboard for continued conversations. Our small class sizes and invitation-only enrollment encourage thoughtful, active dialogue during sessions. Courses, which run on a regular schedule, are led by senior Bernstein strategists who specialize in the subject matter being taught.

Agenda and Curriculum

Once enrolled, students will gain access to a two-part syllabus comprised of Bernstein's Core Curriculum and Elective Offerings. This bilateral approach safeguards coverage of—and student proficiency in—the most fundamental tenets of finance, while also providing latitude for students to self-direct studies based on their own particular needs and interests. After completing the program, students will receive official documentation from Bernstein certifying their aptitude in the courses they took. A brief outline of the academic agenda is detailed below:



Core Curriculum (delivered to all students)

1. Defining Your Money Story & Identifying Personal Priorities—*A Session with Interactive Exercises*
2. Paving the Way to Financial Success—*An Introduction to Taxes, Budgeting, and Behavioral Finance*
3. Investment Planning—*Stocks, Bonds, and the Importance of Diversification*
4. Essentials of Trust & Estate Planning—*Why It's Important, and How It Affects You*



Elective Offerings (taught at request of students)

1. Developing Your Brand—*Finding Your Purpose and Building Your Reputation*
2. Family Governance—*What Is It, and Why Is It Critical in Multigenerational Families?*
3. Beyond Stocks and Bonds—*The Role of Alternative Investments*
4. Advanced Estate Planning Strategies—*Specific Tools for the Efficient Transfer of Wealth*
5. Strategic Impact—*Vehicles for Charitable Giving and Purpose-Driven Investments*
6. Active & Passive Investment Opportunities—*It's No Longer Either/Or*
7. Philanthropy & Giving Back—*Your Personal Mission and Learning Where to Start*

Developing Future Leaders

Our hope is that by participating in the Leadership Accelerator at Bernstein, participants are encouraged to take ownership and agency over their own financial future and to start meaningful conversations about money within their own families. At Bernstein, we are committed to empowering tomorrow's leaders with the skills required to successfully steward personal and family wealth. If you would like to learn more about our Leadership Accelerator, please do not hesitate to contact your Bernstein Advisor or a member of our Engagement Institute.

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