Scholars of Finance

Inspiring Character and Integrity In the Finance Leaders of Tomorrow

“Finance **needs** this.”

– Richard Davis

Former Chairman & CEO @ U.S. Bancorp, Board Director @ Wells Fargo & Mastercard, Founding Advisor & Alpha Investor @ Scholars of Finance

The Problem(s)

Poverty, war, political division… We face massive problems affecting millions of people at home and abroad, and there is growing volatility and uncertainty about how we might solve them.

The financial system, allocating $100T+, is our greatest lever for tackling them and creating stability—and it needs leaders who are fit for the responsibility of stewarding the world's capital.

Our Solution

Scholars of Finance is on a mission to inspire character and integrity in the finance leaders of tomorrow.

We invest in undergraduate students through leadership development, mentorship, and the active support of finance executives and investors to equip the next generation to become the high-performing, purpose-driven, principled leaders finance needs.

VISION

A future where all finance leaders steward the world's capital to serve the greater good

MISSION

To inspire character and integrity in the finance leaders of tomorrow

We **inspire 4 values** & **12 principles** in **finance**

Integrity

Do the right thing
Be accountable to your decisions
Develop trust with candor

Humility

Understand yourself deeply
Guard against greed and hubris
Remain intellectually curious

Compassion

Serve a greater purpose
Build relationships with respect
Be radically generous

Excellence

Become great at what you do
Work diligently, plan wisely
Stay healthy and balanced

***Courage is not simply one of the virtues but the form of every virtue at the testing point.* — C.S. Lewis**

We are **transforming** our **students' futures**

Aleska Medrano

Columbia University
In the City of New York

"SOF not only provided me with knowledge that I can use in my career, but also ***provided an amazing community of like-minded individuals*** *who are willing to collaborate to bring this positive impact into the world of finance."*

Maya Harrison

Howard University

*"****SOF broadened my perspective on leading with integrity and personal values*** *in the financial industry. I believe that SOF plays a significant role in* ***breaking the stigma associated with working in the financial industry.****"*

Ansaar Baig

Northwestern University

"SOF provides content, resources, and builds a community ***committed to upholding values of integrity, humility****,* ***compassion****,* ***excellence****, and* ***stewardship****. No other programs target ethical leadership in the same way."*

And **our alumni** are **transforming finance**

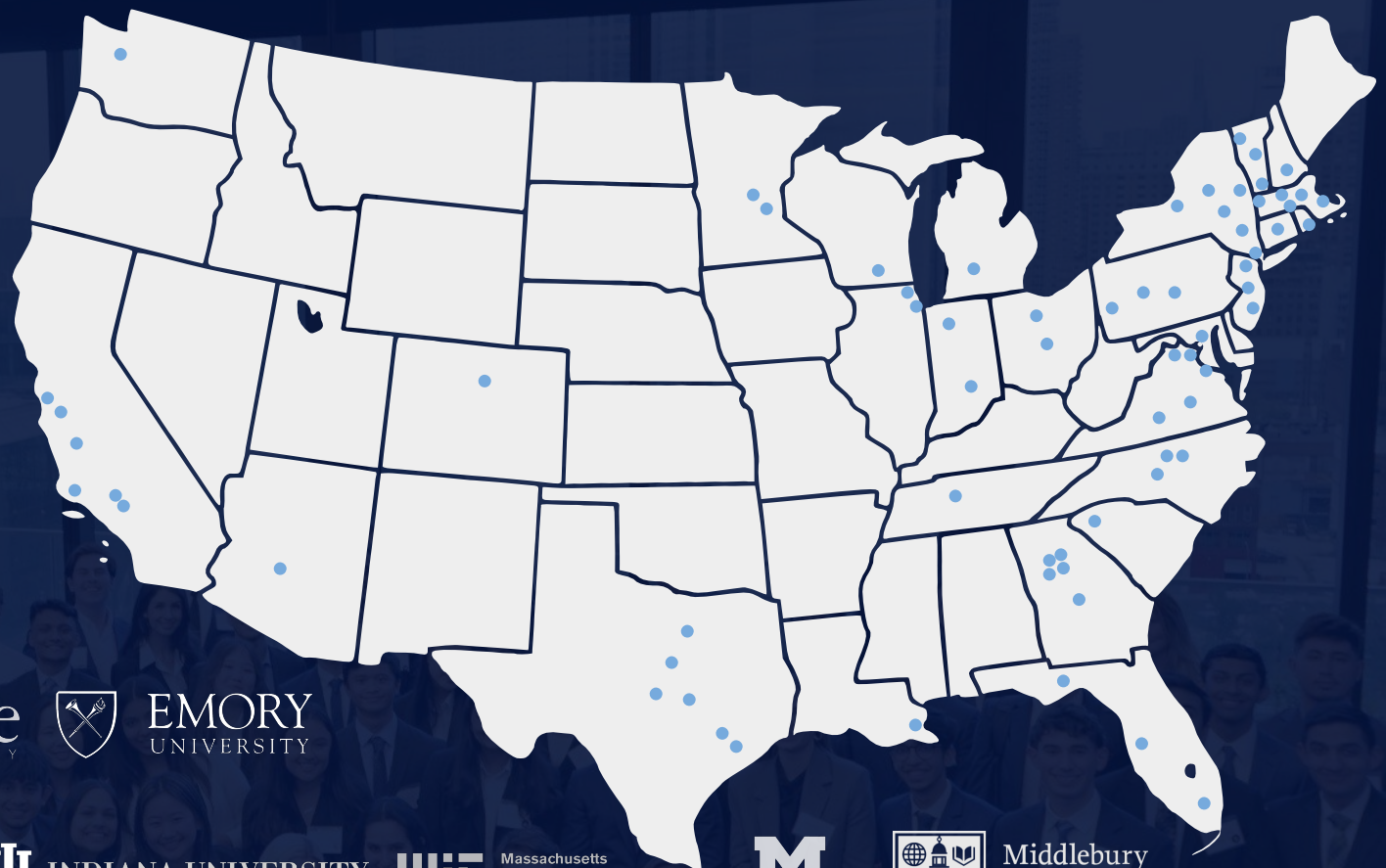
One of our first SOF graduates, Holly, joined Bank of America as an Analyst. In her first several months she was invited to join a panel to discuss the firm's investing and culture with senior leaders.

She said, ***"SOF laid the groundwork for me to be able to express my passion for ethical finance and be courageous during those conversations."***

Holly was asked to help form a new Advisory Board of select Analysts and Associates to reverse-mentor the firm's executives to rethink old practices and evolve them for social good.

Holly Cheek
Scholars of Finance Alum

SOF is **established** at **68 universities**, **including**:



Berkeley
University of California
Boston College
Brown
Carnegie Mellon University
The University of Chicago
Columbia University in the City of New York
Cornell University
Dartmouth
Duke University
Emory University
Florida A&M University
Harvard University
Howard University
Indiana University
Massachusetts Institute of Technology
University of Michigan
Middlebury College
Morehouse College
North Carolina Agricultural and Technical State University
Northwestern University
NYU
Princeton University
Penn
Stanford University
Spelman College
The University of Texas at Austin
UCLA
University of Minnesota
The University of North Carolina at Chapel Hill
USC
University of Virginia
Yale University
Vanderbilt University

We have **strong traction** and **growing demand**

10K+
total students impacted

4K+
members + candidates

20%
first-generation low-income

7K+
leadership program graduates

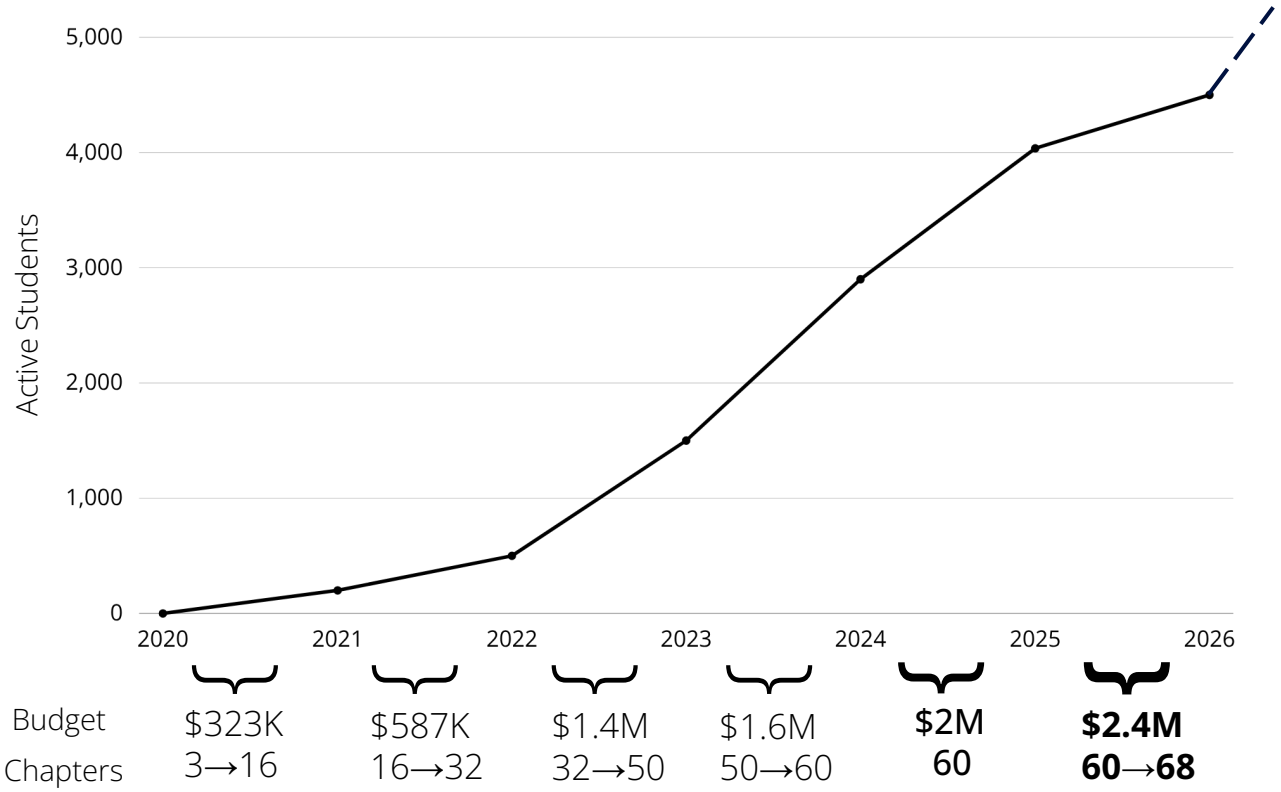
1.9K+
mentorship pairs matched

$14M+
total funding received

SOF scaled rapidly as a **startup**; **we transformed our model** in **2024** and **resumed growth** in **2025**

2020 was our first year with a full-time team. By 2024, we scaled from 3 universities to 60 and from 40 students to almost 3,000. **In 2024, we reimagined the depth of our impact.** We paused geographic expansion to focus solely on depth of formation.

In 2025 we resumed growth—expanding from 60 to 68 sites. We continue to iterate on our model annually, more deeply forming each of our students as future finance leaders fit to steward the world's capital.



We **reimagined** our **impact—ensuring** it is **both transformational** and **durable** for **decades** to **come**

Many of our students will manage billions of dollars one day, maybe trillions collectively. **It's critical we prepare them for the massive responsibility they will carry.**

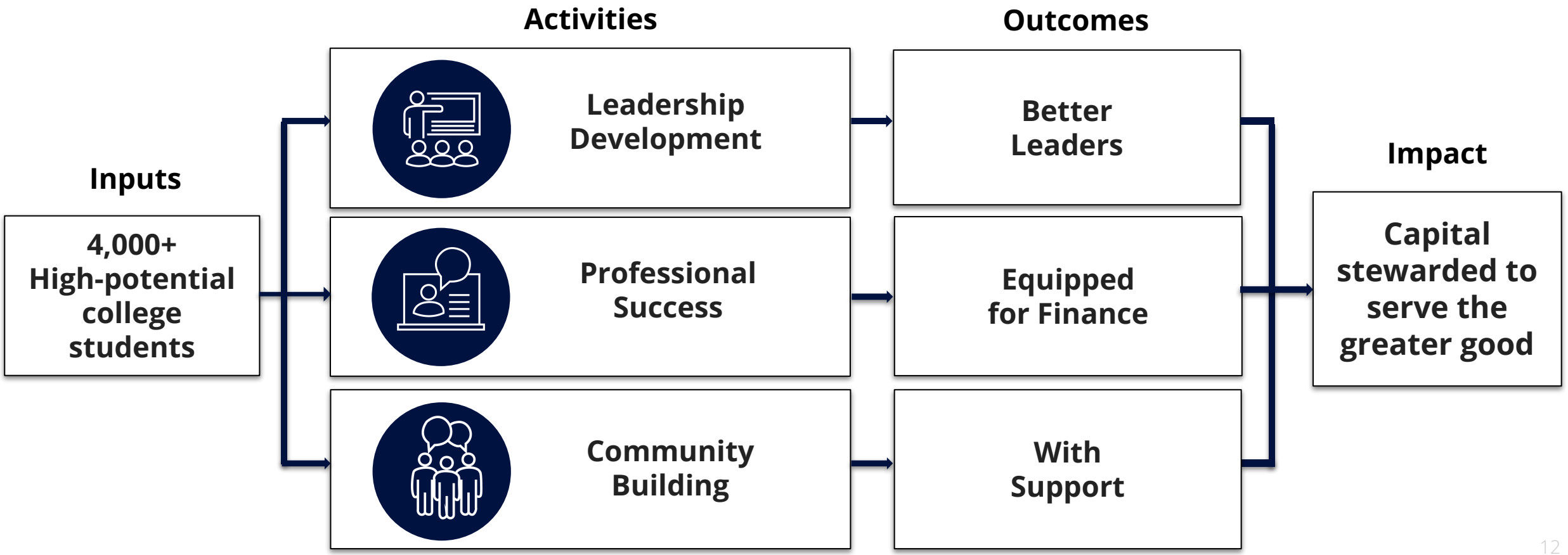
We made a formula for our key impact metrics. We want to serve more students, and we need to ensure our programs deeply impact them, shaping them as lifelong leaders, and **we need to ensure that impact doesn't decay over time, but rather**, **it compounds**.

$$S \times I^d$$

Where:

- S = students we serve
- I = depth of SOF impact
- d = durability over time

SOF's Impact Model has **three pillars** for **building** a **generation** of **principled future finance leaders**



We **offer 15 programs** and **experiences**, **providing students more than any other organization does**

Inputs

Target Members

Undergraduate college students in the United States, aged 18-24, interested in principled leadership and pursuing or exploring a career in the finance industry.

Recruiting & Selection

Recruitment:
Potential candidates from 60+ universities across the US

- Complete an application
- Complete 2+ interviews

Activities

Leadership Development

- Leadership Development Program
- LDP 2 & LDP 3
- Chapter Leadership Opportunities
- Annual Leadership Deliverable
- Principles Workshops
- Volunteering
- Leadership Symposia

Professional Success

- Industry Introductions
- Recruitment Bootcamp
- Integrity Fund
- Technical Workshops
- Mentorship Network
- Speaker Series
- Training the Street

Community Building

- Socials
- Peer Mentorship Program
- Networking Events

Outcomes

Better Leaders

- Members have identified current purpose, which drives their focus
- Members understand how to be an ethical leader in finance
- Members understand how to steward the world's capital to serve the greater good

Equipped for Finance

- Members understand the finance industry and opportunities for impact
- Members attain internships and analyst roles in the finance industry
- Members are equipped to excel in finance-related roles

With Support

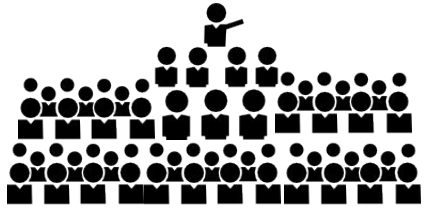
- Alumni have a strong network and inner circle, which consist of other SOF alum

Impact

Vision

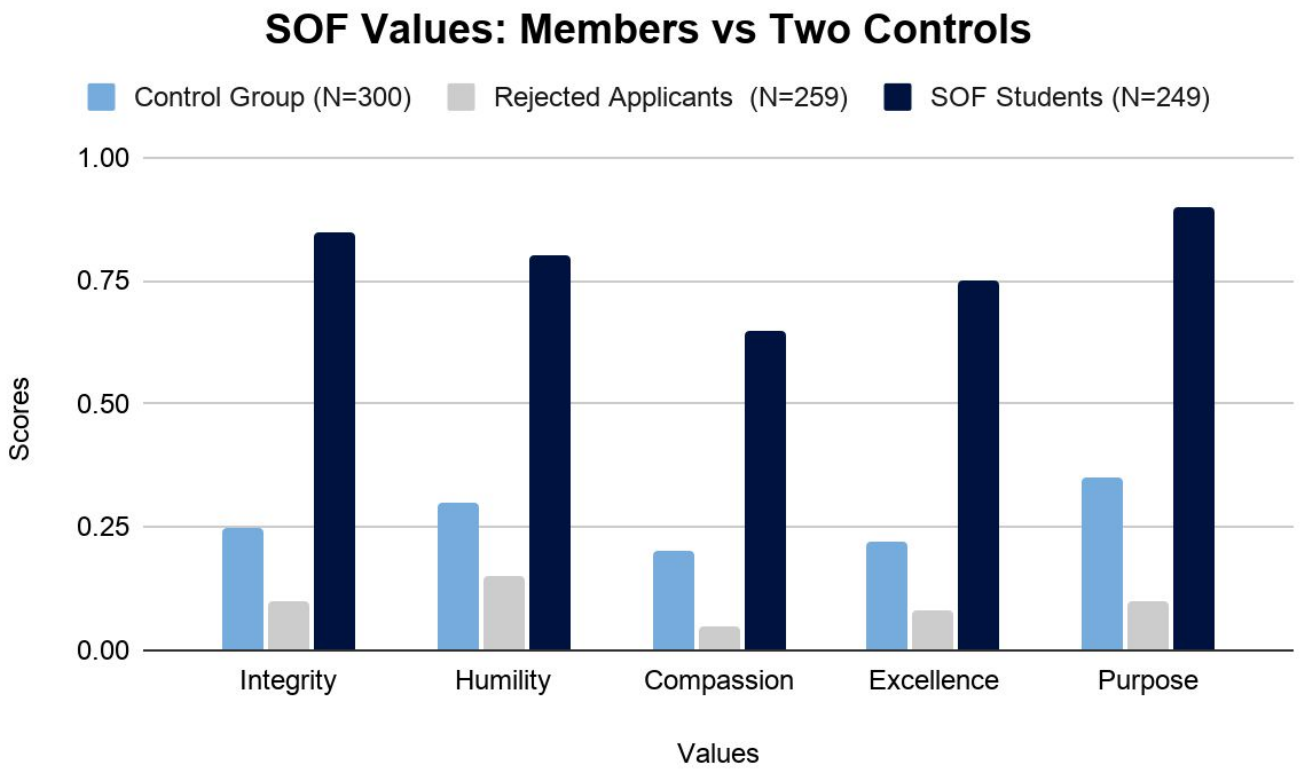
SOF finance leaders steward the world's capital to serve the greater good

Student Leaders are **trained by SOF National** to **facilitate SOF's programming** at **local chapters**

	# of Members		
National Team	**17**		The SOF National Team (specifically our CEO & Student Impact Team) create programming content and deliver it digitally or via cases and written guides.
Student Leaders	**500+**		The SOF National Team (3 Chapter Success Managers & Leadership Coaches) train Student Leaders on how to facilitate—students are not teaching. All curriculum is direct-to-student from the SOF National Team.*
Members + Candidates	**4,000+**		The Student Leaders facilitate weekly discussions and activities to solidify learning, develop interpersonal skills, and build an engaged, supportive community.

*SOF has its own App ("The SOF App") which students use to track their deliverables and complete our curriculum at home. Our team tracks and measures program and chapter health using the app, and delivers all content through it. This unlocks scale while maintaining quality.

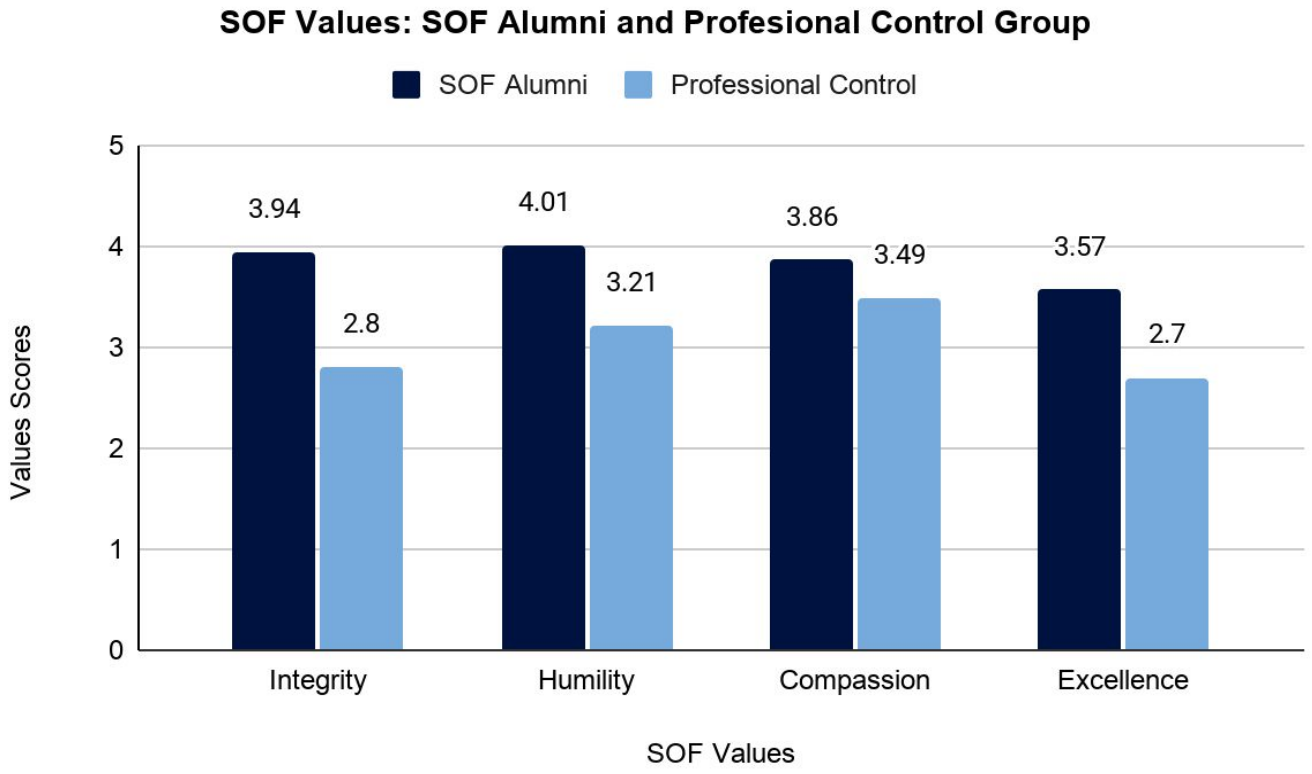
Scholars of Finance students are **significantly more purpose-driven** and **principled** than **their peers**



With top researchers at Harvard GSE, each year we analyze our students' character. They rigorously optimize against self-reporting bias. We compare SOF students to a control group of students interested in finance, and also applicants not admitted to SOF.

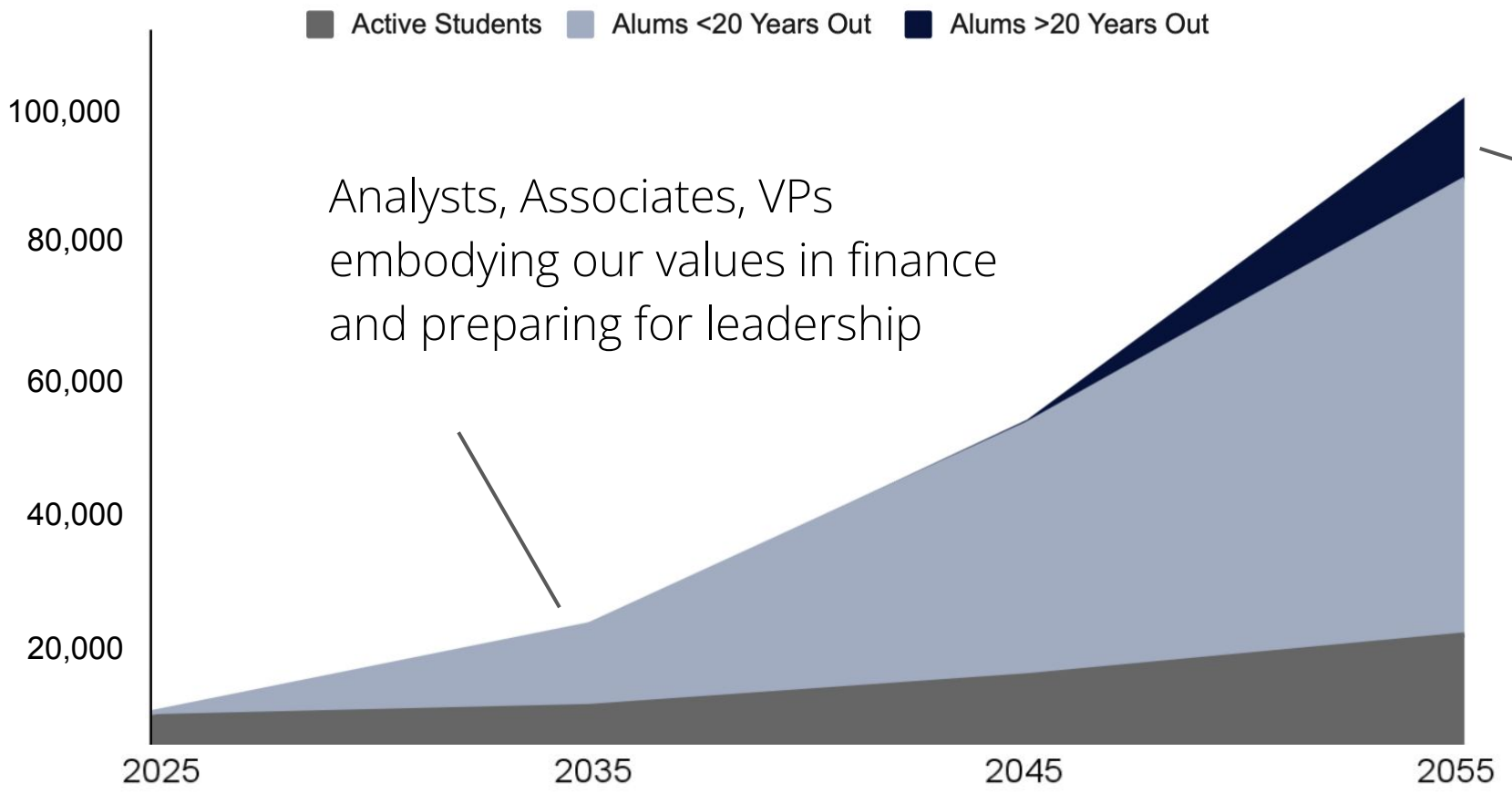
We continue to see SOF members consistently score higher on values and purpose with strong statistical significance ($p < .001$). *We created the first home for principled future finance leaders.*

And **SOF alumni maintain substantially stronger leadership values** than **non-SOF professionals**



Alumni vs. Professional Effect Sizes		
Integrity	Δ = 1.95	Very Large
Humility	Δ = 1.50	Very Large
Compassion	Δ = 0.85	Large
Excellence	Δ = 1.67	Very Large

SOF's impact compounds over time, with **significant leverage** when our **alumni steward capital** at **scale**



Analysts, Associates, VPs embodying our values in finance and preparing for leadership

MDs, Partners, C-Suites, Board Directors managing trillions of dollars, leading large organizations, and stewarding our financial and economic systems

We have **an audacious vision** for the **future** of **finance** and **together** we **can make it reality**

2020	2025	2026	2050
First year with full-time staff	Significantly deepen student impact	Equip our students for the AI future	**A stronger global financial system**
1K+ leaders	**5K+ leaders**	**25K+ leaders**	**100K+ leaders**

SOF is **made possible** by **generous executives** and **firms** who **believe** in **our vision** and **mission**

Advisors & Donors

Bill George
Former BOD
Goldman Sachs

Jim O'Donnell
Vice-Chair
Citi

Teri List
Board Director
Visa, Microsoft

Richard Davis
Former CEO
U.S. Bank

Eric Wu
Senior MD
Blackstone

Daniel Hibbert
Managing Director
BlackRock

Bob Joss
Former Dean
Stanford GSB

Chris Larsen
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Ripple

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State Street

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Former CFO
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Yassaman Salas
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Daniel Pietrzak
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KKR

Ben Brady
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Bain Capital

JC de Swaan
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Kristine Braden
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Michael Occi
CEO, Pvt. Credit
Morgan Stanley

Deb Schoneman
President
Piper Sandler

Scott Kupor
Former MP
a16z

Kofi Bruce
CFO
General Mills

Chris Campbell
Frm. Deputy Secretary
U.S. Treasury

Founding Partners

Morgan Stanley
Goldman Sachs
charles SCHWAB
KKR
PIPER | SANDLER
Blackstone
BlackRock

There are **many ways you can give back** with **SOF**

- **Impact our students lives directly.** Speak to a chapter, be a keynote at a conference, or mentor our students 1:1. Can you spare an hour to change lives?
- **Empower SOF students recruiting.** Connect SOF to your recruiting team. Can you help us show HR that SOF students are the top talent pool to draw from?
- **Help us meet principled leaders.** Introduce us to colleagues who align with our mission. Could you connect us with 2-3 principled executives or investors?
- **Share your advice with our team.** Guide the direction of our organization. Can you help us set strategy, mitigate risks, and seize opportunities for growth?

Contact
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SoF