



T3 MASH-UP

A FINTECH COLLEGIATE COLLABORATION

PURPOSE

A team of 2 Financial Planning students and 2 Computer Science students (at least one of each, max two of each) will be paired with a participating tech firm and compete to develop a new technology (or expand on existing) that provides a solution to any financial planning problem or issue that our industry faces today.

THE PROJECT

- Kickoff project no sooner than Oct. 1, 2019
- Each firm mentors one team comprised of 2-4 students, representing both tech and financial planning fields
- All programming and writing MUST be done by students, not the advisor, coach or mentor
- Sponsoring tech firms may join together to mentor a student team and share the cost
- Each student team will likely build their project specific to the mentor's platform
- Each team will present their project at the T3 Conference in San Diego (February 2020)
- There will be scholarship prizes for the participants
- No more than 10 teams may compete (to save on presentation time at T3)

MENTOR RESPONSIBILITIES

- Mentors will provide training and support to the student team
- Mentor firms will finance the cost of attendance, travel and lodging for their student team at the T3 Conference (cost is \$4,000, which can typically be donated directly to the school)
- Mentors may include an RIA to act as a coach for their team, helping students to develop ideas that are relevant to the challenges advisors are currently facing
- Each mentor firm may decide how they wish to train and support their team
- Each mentor firm is able to determine the number of students on their team (min 2 and max 4)

ADDITIONAL NOTES

- If mentoring tech firms have a relationship with a specific university, they can elect to partner with that university. However, it is important that the school has a financial planning program.
- It may be helpful for advisor/coach to be local to the university, but not required.
- If the mentoring firm is a platinum sponsor of T3, there is no additional cost for the students to attend. Otherwise, the mentoring tech firm must pay the T3 student registration fee for each student on their team.