



2022

ANNUAL IMPACT REPORT

AMERIVET SECURITIES



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A Message From Our Co-CEOs

Dear friends and valued clients,

AmeriVet Securities' mission to authentically serve and add value to our clients and the veteran community continued, despite challenging market conditions in 2022.

The continued growth in our revenue throughout 2022 allowed us to create meaningful action on issues affecting veterans including mental health, unemployment, homelessness and more.

We expanded our veteran engagement efforts in the Midwest, connecting with veteran groups and veteran-owned businesses in Chicago, Illinois. We facilitated and hosted 12 in-person events in New York City and Chicago combined, positively impacting nearly 1,000 veterans. In addition, we are expanding our veteran engagement initiatives to the west coast next year, beginning with an event in San Diego, California, in the spring.

As we turn our focus to 2023, we want to thank you for your continued support throughout this past year. We are proud to be part of a team that comes together every day to serve our clients and the veteran community in a meaningful way.

We look forward to working with you and continuing our impact this year!



Mercedes Elias and Michael Naidrich
Co-CEOs, AmeriVet Securities



AMERIVET SECURITIES 2022 HIGHLIGHTS

- Our current staff is made up of **more than 50%** military veterans. In addition, our staff is approximately **30%** minorities and **20%** women.
- We participated in more than **35** events and sponsored **20** events.
- We added five full time employees to our team, two of whom are military veterans.
- Our firm welcomed six military veteran interns, including our first all-women veteran cohort.
- We partnered with the Chicago Summer Business Institute (CSBI), an internship program for underserved students in the Chicagoland area and hosted our first CSBI intern.
- We collaborated with seven veteran-owned companies, including one new company, Jus Sandwiches, based out of Chicago.

Our team facilitated and hosted 12 in-person events in New York City and Chicago, impacting nearly 1,000 veterans.



THE POSSE FOUNDATION, INC.



FOURBLOCK
VETERAN CAREER READINESS



— ENDEAVOR —
THERAPEUTIC HORSEMANSHIP



Our employees volunteered a combined total of **200** hours.

Internship Program and Hiring

This fall, we welcomed our first all-women veteran internship cohort:

- [Jing Qu](#) currently serves in the U.S Army Reserves and earned her undergraduate degree at Qingdao University. She took her CFA Level II exam during her time at our firm.
- [Cassidy Kelly](#) is a U.S. Army veteran and earned her undergraduate degree at the University of Virginia. During her internship, she passed her FINRA Securities Industry Essentials (SIE), Series 79 and Series 63. Ms. Kelly accepted a full-time position with UBS, which will begin in January 2023.

Our internship program covers the cost of study materials and testing registration for interns who want to take the FINRA SIE and licensing exams. It is important for us to set our military veteran interns up for success and provide support if they decide to forge a career in financial services following the program.

AmeriVet Securities interns have gone on to:

9 Bulge Bracket
Banks

4 MBA
Programs

2 Private
Equity

3 Boutique
Firms



[Aleck Gao](#) and [Thomson Wong](#) joined our internship program over the summer of 2022. Mr. Gao is a U.S. Air Force veteran and is studying at Wesleyan University. Mr. Wong is studying at Columbia University and served in the U.S. Army and the California National Guard for three years.

We welcomed [Alexander Meyers](#) into our spring internship program on the Debt Capital Markets desk and his internship was extended throughout the summer and fall semesters, as an intern with Equity Capital Markets. Mr. Meyers is a U.S. Marine Corps veteran and is currently obtaining his bachelor's degree from Stony Brook University.

[Alexander Barney](#) is a Financial Analyst Intern on our Equity Capital Markets team. He is a U.S. Marine Corps veteran and interned for our firm previously in 2020 and 2021.

Since our internship program began in 2018, more than 30 of our military veteran interns have moved on to secure roles at financial services firms or pursue graduate-level degrees at institutions such as Harvard, NYU Stern School of Business [and more](#).

Internship Program and Hiring

This summer, we welcomed Yarissa Lazaro, our first intern from the Chicago Summer Business Institute (CSBI), formerly known as the Chicago Summer Finance Institute. Ms. Lazaro had the opportunity to rotate across our Debt and Equity Capital Markets, as well as Public Finance, and learned about financial services and the different lines of business at our firm.



Michael Dmitriyevich



Eric Eberth

Throughout the year, we continued our mission to produce meaningful opportunities for veterans, with five new employees joining our team, including two former military service members.

- [Michael Dmitriyevich](#) joined our Public Finance team as a Financial Analyst. He recently transitioned from active duty to the U.S. Marine Corps reserves.
- [Eric Eberth](#) serves as a Director in Public Finance and is a veteran of three different service branches: the U.S. Air Force, U.S. Marine Corps and U.S. Army.
- [Mark Matthews](#) is our Senior Vice President of Fixed Income Sales. He most recently worked at Dinosaur Financial Group, where he focused on charter school origination with institutional high yield accounts.
- [Robin Simon](#) joined us as an Operations Associate. He previously worked as a Senior Client Reporting Analyst for UBS and has extensive experience in tax reporting and fixed income trade processing.
- [Peter Simpson](#) is a fixed income institutional professional with more than 25 years of experience on both the buy and sell side.

Leadership and Development

The single biggest way to impact an organization is to focus on leadership development.

– John M. Maxwell

We encourage our employees to invest in themselves through leadership and professional development, as it enhances engagement and performance, while inspiring others.

Ms. Elias, a U.S. Marine Corps veteran, was accepted into the Wharton School of Business Executive Master of Business Administration program at the University of Pennsylvania. She started the program in the spring of 2022 with a major in finance and graduates in the fall of 2024.



Ms. Covington, a U.S. Army veteran, concluded the [Stand-To Veteran Leadership Program](#) at the [George W. Bush Presidential Center](#) in October.



Ms. Covington was one of approximately 50 selected to attend the program, which included active-duty service members, veterans, and civilians from diverse backgrounds and sectors.

Throughout the five-month program, Ms. Covington heard from a variety of nationally known and distinguished professionals, educators, and experts in veteran and military family transition issues. Her final project [highlighted the many issues](#) women veterans face and proposed solutions, which includes connecting them to roles in finance.



GEORGE W. BUSH
PRESIDENTIAL CENTER

[Jennifer McDonough](#), Associate, is currently a Commander in the U.S. Navy Reserve. Part of her professional development, as a Strategic Sealift Officer and a Wargame Analyst with the Joint Staff, includes a two-year Joint Professional Military Education course that focuses on the Theory of War, Ethics and National Security Strategy. The program prepares senior officers like Ms. McDonough to qualify for a Joint Service Officer designation and empowers interoperability among the services. She began the 98-credit course in the fall of 2021 and graduates in the summer of 2023.



Education and Mentorship

In partnership with Signature Bank, our firm hosted approximately 40 participants from around the country in the First-Time Investor Program (F-TIP), a course designed to educate veterans about the financial tools available to help plan for their future.

The course educates veterans on the investment tools available to help them prepare for their financial future.

“

Veterans are almost twice as likely to have debt carried over from month-to-month than civilians. Additionally, 55% of veterans believe they are ill-prepared for a financial emergency.

- National Foundation for Credit Counseling

”



Several of our employees volunteered their time to serve as speakers and instructors for the program:

- [Mercedes Elias](#) and [Michael Naidrich](#), Co-CEOs
- [Carmine Urciuoli](#), Managing Director, Head of Sales and Trading
- [Tom Voorhees](#), Executive Director, Fixed Income Trading
- [Amanda Gragg](#), Vice President, Debt Capital Markets
- [Eric Eberth](#), Director, Public Finance
- [Sidney Covington](#), Associate, Veteran Engagement
- [James Fitzgerald](#), Associate, Communications and Engagement



Each session was hosted at our midtown Manhattan office and utilized in-house technology assets, which allowed participants to join both virtually and in-person.



Community Advocacy

We are proud to be a member of the Veterans on Wall Street (VOWS) consortium, which consists of more than 100 financial services firms and companies dedicated to providing opportunities to former and current military as they transition into the corporate workforce.

Ms. Elias, a U.S. Marine Corps veteran, served on the VOWS Executive Impressions Panel. She discussed the importance of diversity in financial services, provided advice to transitioning military servicemembers and shared her personal story of transitioning into finance.



[VETS Indexes](#) goal is to educate, equip, and prepare corporations to welcome veterans to their company. They hosted their semi-annual conference this spring where Ms. Covington hosted a panel of women veterans and corporate professionals to discuss women veteran unemployment and underemployment.

Mr. Fitzgerald served on a VOWS panel to share insights on diversity and inclusion, and discussed the importance of hiring and retaining veterans.



Social Impact

Throughout 2022, AmeriVet provided support on multiple issues impacting veterans and their families. Our team provided financial sponsorships, hosted events and volunteered with organizations that directly impact the veteran community. This included organizations that address veteran homelessness, mental health and military children, as well as women and minority veterans.



Social Impact

"There is no power for change greater than a community discovering what it cares about" - Margaret Wheatley

Veteran Homelessness

Minnesota Assistance Council for Veterans



Mental Health

Headstrong



Women Veterans

NYU Veterans Future Lab



Minority Veterans

Black Veterans Empowerment Council



Military Children

Kids Rank



Veteran-Owned Businesses

As a veteran-owned firm, we take pride in working with entrepreneurs and organizations that support veteran businesses. One of our goals is to ensure we are giving back to our community by partnering with these entities.

As we expanded our outreach in the Chicagoland area and continued to utilize local veteran-owned businesses at our events. We partnered with the [Chicago Fireboat Tours](#) for the second year in a row to host the [Semper Fi Fund's](#) pre-Chicago Marathon lunch. Additionally, we started two new partnerships with [Jus Sandwiches](#), a black women veteran-owned catering company from the south side of Chicago. We also partnered with [Veteran Roasters](#), a veteran-owned coffee roasting company that hires at-risk veterans.



Last year, we began utilizing [Milk Money Kitchens](#), a minority woman veteran-owned shared commercial kitchen space in Manhattan that provides opportunities for food businesses to launch and grow their brands. This spring, we utilized [Talea Beer Company](#), a woman veteran-owned brewery based out of Brooklyn, NY, to provide refreshments at the events hosted in our New York office.

We partnered with [Government Content](#) once again to [create a video](#) highlighting AmeriVet's key leaders, their diverse backgrounds and their dedication to the veteran community. Government Content was founded by a 2005 West Point graduate and the organization is made up of military veterans with a passionate focus on storytelling.



GOVERNMENT CONTENT®
MARKETING / ANALYTICS / CREATIVE
8(A) / HUBZONE / SDVOSB / MBE

Appendix

Hosted Events with Community Organizations

[Black Veterans Empowerment Council](#)
[Chicago Veterans](#)
[Endeavor Therapeutic Horsemanship](#)
[FourBlock](#)
[LunaCap Foundation](#)
[National Able Society](#)

[The Posse Foundation](#)
[Semper Fi Foundation](#)
[Team Red, White, and Blue](#)
[Travis Manion Foundation](#)
[Veteran Advocacy Project](#)
[Women Veterans on Wall Street](#)

Financial Sponsorships Provided

[Aspira NY](#)
[Bob Woodruff Foundation](#)
[Do More 2gether](#)
[Headstrong](#)
[iMentor](#)
[JP Morgan Veterans Job Mission](#)
[Kids Rank](#)
[Marine Corps Scholarship Foundation](#)
[Military Spouse JD Network and Foundation](#)

[Minnesota Assistance Council for Veterans](#)
[New York University Veterans Future Lab](#)
[Northwell Side by Side NYC](#)
[The Pritzker Military Museum](#)
[Tee it Up for Troops](#)
[USO](#)
[VBC Giving Foundation](#)
[Vets Indexes](#)

Veteran-Owned Businesses Supported

[Black Six Coffee Co.](#)
[Chicago FireBoat Tours](#)
[Government Content](#)
[Jus Sandwiches](#)
[Money Milk Kitchen](#)
[Talea Beer Co.](#)
[Veteran Roasters](#)



**VETERAN
ADVOCACY
PROJECT**

