




# 2023

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## M I D - Y E A R I M P A C T REPORT

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### AMERIVET SECURITIES

 1155 Avenue of the Americas, 14th Floor  
New York, NY 10036

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# Q1 and Q2 Highlights

Our current staff is made up of more than **50% military veterans**, and **approximately 30% minorities** and **15% women**.



Honoring our President and Prisoner of War Bob Jones during the 50th Anniversary of Operation Homecoming



The Mission Continues "Operation District Drilldown" Week-long Service Initiative



We participated in more than **14 veteran events**, sponsored **7 events** and volunteered a combined total of **50+ hours**.

Our team facilitated and hosted **6 in-person events** throughout New York, Chicago and San Francisco, impacting more than **100 veterans**.



Veterans in Finance Networking Event



Summer Interns



We hired **6 new employees**, including **4 military veteran interns**.

# Internship Program



**Jay Zhang**  
U.S. Marine Corps  
Veteran



**Eric Kostakis**  
U.S. Marine Corps  
Veteran



**Richard Bryan**  
U.S. Army  
Veteran



**Brandon Vi Nguyen**  
U.S. Air Force  
Veteran

Throughout the course of their time with us, our interns have the opportunity to learn more about the different roles and options as they move forward with their professional careers to ensure they are set up for success to pursue a career in financial services. Our internship program covers the cost of study materials and testing registration for interns who want to take the FINRA SIE and licensing exams.

See below to learn more about the interns who joined us in 2023.

- [Jay Zhang](#) joined us as a spring intern on our Debt Capital Markets desk. Jay served in the U.S. Marine Corps.
- [Eric Kostakis](#) served in the U.S. Marine Corps for four years at Camp Lejeune, North Carolina. This summer, he joins us as an Operations intern.
- [Richard Bryan](#) is a U.S. Army veteran who previously spent more than 15 years serving his country. He currently serves as a Debt Capital Markets intern.
- [Brandon Vi Nguyen](#) served in the U.S. Air Force for four years and was stationed at Wright-Patterson Air Force Base, Ohio. Brandon serves on our Equity Capital Markets desk.

In June, we welcomed Keenyriah Jarrett, our second summer intern from the [Chicago Summer Business Institute](#) (CSBI), formerly known as the Chicago Summer Finance Institute. Miss Jarrett will spend the summer learning about financial services and the different lines of business at our firm.



**Keenyriah Jarrett**  
CSBI Intern

*In the second half of 2023, interns will take part in a rotation at multiple financial services to help them better understand what career paths are available and what positions may be the best fit.*

Our team was invited by Morgan Stanley to meet the Secretary of the Navy, Carlos Del Toro, during the opening remarks for Fleet Week this May in New York. Our military veteran interns had the opportunity to speak with Mr. Del Toro, connect with military veteran supporters and learn more about the causes they will support during their internship with us.





# Social Impact

## Veteran Homelessness

### Minnesota Assistance Council for Veterans

Supports transitional and permanent housing for homeless women veterans



## Diversity, Equity and Inclusion

### ASPIRA Gala

Supports education in the Puerto Rican and Latino communities



## Mental Health

### Endeavor

Offers in-person and virtual equine assisted services for veterans and their families



## Military Children

### Kids Rank Gala

Supports children affected by their parents' military service



### Children of Fallen Patriots

Provides college scholarships and educational counseling for military children who have lost a parent due to their military service.





## Women Veterans

To commemorate the 75th anniversary of the Women Armed Integration Act (Women Veterans Day) in June, we partnered with [Women Veterans On Wall Street \(wVOWS\)](#), the [Bob Woodruff Foundation](#), and [Federal Home Loan Bank of San Francisco](#) to host a discussion panel focused on women veterans' transition to corporate America.



We continued to celebrate Women Veterans Day in June, hosting an event with wVOWS Chicago, honoring the service, sacrifice and commitment women veterans have contributed to our country.



## Women's History Month

In honor of Women's History Month, we co-hosted an event with wVOWS in Chicago, Illinois, our first in Chicago with wVOWS. We featured a panel of women veterans who continue to pave the way for others interested in joining financial services, and encouraged recruiting more women veterans into the industry.



Our Co-CEO, Mercedes Elias, served as a panelist at BNY Mellon's 13th Annual Women's Day event. She discussed opportunities to improve equity and democratize access for women and other diverse and traditionally underrepresented groups.





# Community Engagement

It is important for us to remain authentically connected and present within the community. In 2023, we continued to show our support for veterans and the local community at a wide range of events.

## Fleet Week

Honoring the U.S. Navy, Coast Guard and Marine Corps at the Parade of Ships



## Memorial Day Ruck March

14-mile ruck march with veterans and military family members honoring those who gave the ultimate sacrifice



## Tunnels to Towers Foundation

[Tower Climb](#) up One World Observatory celebrating the lives and sacrifices of 9/11 heroes



## National Vietnam War Veterans Day

[Ceremonial reading](#) of the 1,744 New Yorkers who served and lost their lives in the Vietnam War





# Compass Check Podcast



As we enter the second year of our [podcast](#), we continued our work to help veterans navigate transitioning into the corporate workspace.

In the first half of 2023, our Compass Check spoke with representatives from five different companies. Each episode highlights client initiatives for veterans, and ranges across many items, including:

- Veteran programs
- Resource groups
- Recruiting efforts
- Different available opportunities

*If you are interested in sharing information on your firm's resources or if you would like your veteran outreach program highlighted in a future episode, please reach out to James Fitzgerald at [jfitzgerald@amerivetsecurities.com](mailto:jfitzgerald@amerivetsecurities.com)*

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WAKEFIELD**