

Independent Study And Mentorship

**Final Presentation Night
April 27, 2021**

Presenter: Avery Wilder

**Under the mentorship of
Charles Daniel**

**Topic: Asset
Management**

Speech Outline

- **Research**

- Informational Interviews
- Secondary Sources

- **Original Work**

- Thought/Completion Process
- Real World Application

- **Mentor Experiences**

- Selection Process
- Personal Experience

- **Product**

- Thought/Completion Process
- Real World Application
- Future Plans

Presenter Biography

About Me

My name is Avery Wilder and I am currently a senior at Frisco High School. This year I have studied asset management through the Independent Study and Mentorship (ISM) program. I am studying under the mentorship of Charles Daniel and have gained valuable knowledge and experience through his guidance. Outside of ISM I am an active member of several clubs and organizations including DECA, BPA, Student Council, and National Honor Society.



Product Description

For my final product I decided to create something designed to inspire millions. With the help of my mentor I have created a children's book about the stock market and the world of investing. With this product, my goal is to inspire millions of young children around the world and educate them on a topic that is not traditionally taught in schools.

Mentor Biography

Charles Daniel

Charles Daniel is a wealth management advisor at Merrill Lynch and a certified investment management analyst (CIMA). Merrill Lynch is an investing and wealth management division of Bank of America. Merrill Lynch also engages in prime brokerage and broker-dealer activities. Mr. Daniel meets regularly with a variety of clientele and discusses the best financial course of action for them based on their specific needs and desires. Mr. Daniel strives to help others realize the life they want through dedicated and caring wealth management.



Special Thanks

I would like to dedicate this space to thank my mentor, Charles Daniel, and my family for helping me throughout my ISM journey and with the completion of my product. Without these people none of this would have been possible, and I hope I can continue to grow and learn with them.