



*Driving Generational Wealth-Building Through
Community Impact*

CLIMB USA

Madison, Wisconsin

Risa Mohapatra, Tina Dongara, Prachi Joshi, Aarav Bhaskar, Charlie Cochran

**Developing future
business leaders
equipped to help
solve some of
today's toughest
economic and
social challenges**

Internship Site Overview

CLIMB's Mission

- To help teens and young adults improve their financial capability through education and capital market engagement

CLIMB's Vision

- Financial independence is attainable for everyone no matter the background or prior circumstance

CLIMB's Initiatives and Impact

- CLIMB USA is a 501c3 non-profit organization dedicated to building wealth in underserved communities and closing the racial wealth gap through engagement with the capital market. With five innovative programs — Stock Market Experience, Community-Based Investment Enterprise, CLIMB Youth Leader, Go4IT!, and CLIMB Economic Club — CLIMB USA aims to enhance financial literacy, empower individuals to invest together, and foster leadership development.



Kenan Institute of Private Enterprise



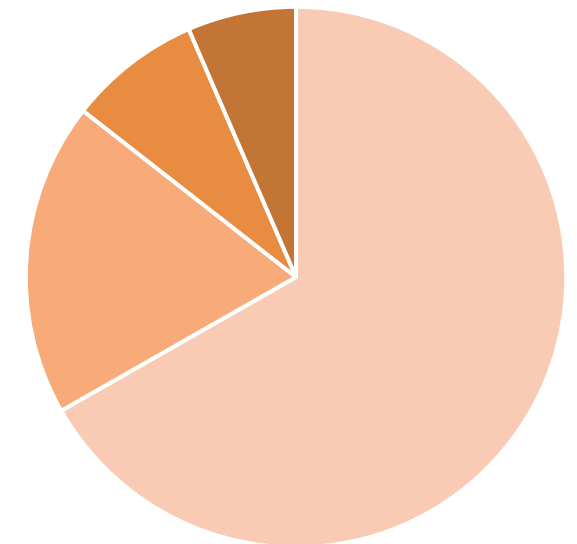
Internship Roles and Responsibilities



Kenan Institute of Private Enterprise

90% of CLIMB's revenue comes from foundations and grants

All Nonprofit Donations - 2023



■ Individuals ■ Foundations ■ Bequests ■ Corporations

Strategy Intern – CLIMB USA

- Supported overarching initiative to **diversify revenue streams** for long-term sustainability
- Collaborated across **four workstreams**: marketing, curriculum, AI, and events
- Collected and analyzed stakeholder insights through surveys, interviews, and online research
- Synthesized findings into **actionable strategies** for organizational growth

Research initiatives

- Designed and distributed surveys to students, parents, alumni, and partners
- Conducted interviews with educators, community leaders, and nonprofit professionals
- Researched financial literacy trends, nonprofit funding models, and market benchmarks
- Integrated findings across workstreams to align with CLIMB USA's mission

Opportunities within the role

- Experience in **strategic consulting for nonprofits**
- Strengthened skills in **data collection and analysis**
- Exposure to intersections of **education, technology, and financial equity**
- Contribution to advancing CLIMB USA's mission of financial literacy and generational wealth

Key Findings and Takeaways

Summary of your work

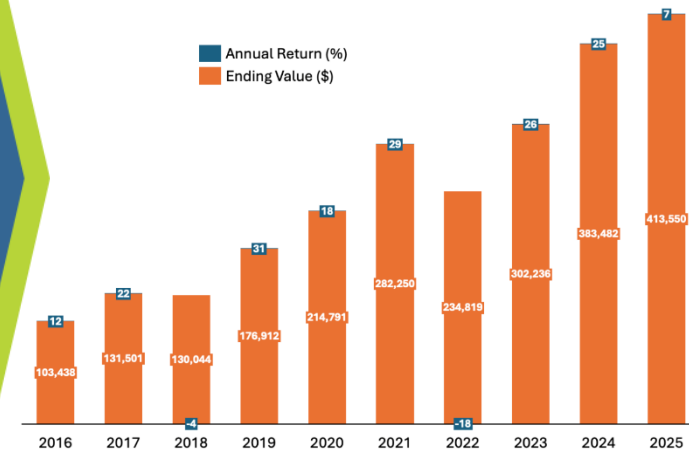
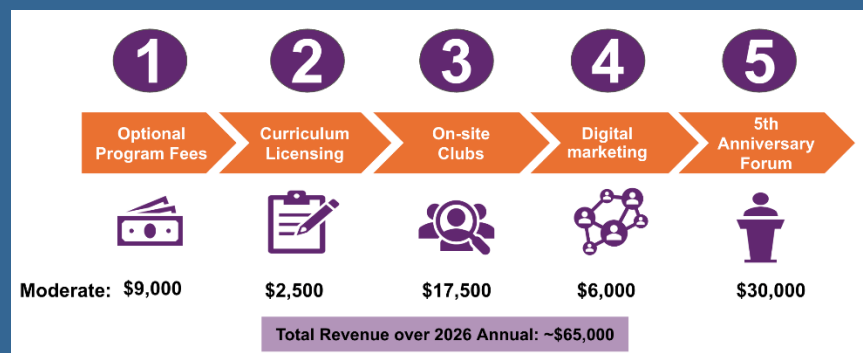
- Supported CLIMB USA’s initiative to **diversify revenue streams** for long-term sustainability
- Collaborated across **four workstreams**: marketing, curriculum, AI, and events
- Conducted **surveys, stakeholder interviews, and secondary research** on nonprofit funding and financial literacy models
- Synthesized insights into strategies to strengthen CLIMB USA’s impact and scalability

Findings and Recommendations

Stakeholders expressed interest in **events, partnerships, and scalable curriculum tools**

Identified **three high-potential revenue streams**:

- Fundraising through **community and corporate events**
- **Partnerships with schools and corporations** for program adoption
- Leveraging **AI tools** to expand curriculum access and grant efficiency



**Regression
Analysis
2016-2025**

Experience Highlights



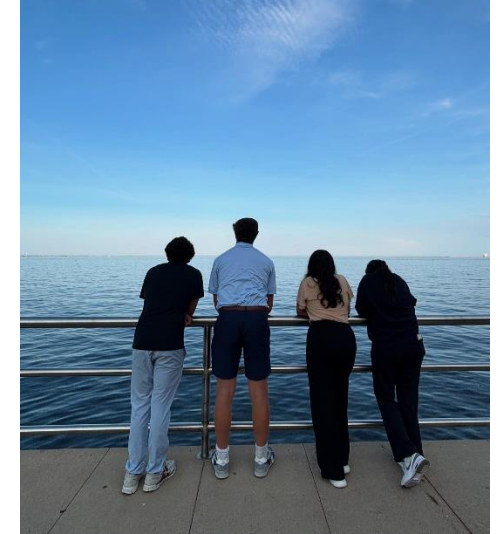
Kenan Institute of Private Enterprise

Professional

- Organized and facilitated **financial education workshops for kids**, seeing curriculum in action
- Met with another nonprofit in Milwaukee and attended a **Morehead-Cain conference**
- Gained exposure to the nonprofit sector through **industry conferences and site visits** (including Epic)

Personal

- Explored Madison, WI, including the **farmers market** and local culture
- Traveled to **Milwaukee, Chicago, and Devil's Lake State Park**
- Enjoyed summer activities like **Raging Waves waterpark** and a **comedy show**



C L I M B

Thank You!

Special thanks to Bob and Millie! You made our summer extremely memorable and filled with a lot of amazing experiences!