

invest℠
Discover Insurance
Launch Your Career

Inspire the Next Generation: **Bring the Invest Student Challenge to Your Local High School**

What does it take to build the future of insurance? In Invest's third annual Student Challenge, students will find out. Building on the success of last's year's competition, which drew 193 teams from 79 schools in 27 states, students will take on a new mission: launch a next-gen insurance agency and assemble a dream team of leaders to drive its success.

INNOVATION IN ACTION: HELP NEXT GEN DISCOVER THEIR INSURANCE PATH

Calling all high school students: Are you ready to build the future of insurance?

Partner with a team of 2-4 people, create an innovative insurance agency, and develop a pitch worthy of investor backing. Then showcase your vision in a 3-5 minute video pitch.

WE NEED YOUR HELP

Insurance professionals like you can play a critical role in inspiring and guiding the next generation. By introducing this challenge in your local community, you can:

- Help educators further engage students on various insurance topics.
- Help students understand the everyday value of insurance and the careers it offers.
- Shift the narrative by presenting insurance as dynamic, essential, and full of opportunity.

NEXT STEPS

- Download the student challenge here to share with your students and schools or visit investprogram.org/studentchallenge
- Share it with a high school teacher, school administrator or guidance counselor.
- Have fun – let others see why you love your job!

WANT TO GET MORE INVOLVED?

- Sign up for one our kickstart calls here: investprogram.org/volunteer

National Invest Program Presents 2027 Student Challenge

Innovation in Action:
Help Next Gen Discover Their Insurance Path



All entries must be submitted by February 1, 2027
investprogram.org/studentchallenge

THE CHALLENGE

You are a young professional launching a new insurance agency and want to build the ultimate team of next gen leaders. To secure startup funding, you must present a business plan to an investment company that demonstrates how your hiring strategy will help your agency succeed. Then, bring your vision to life by creatively summarizing your business plan in a 3–5 minute video pitch designed to persuade investors to fund your agency.

ADDITIONAL DETAILS

This challenge consists of two major parts: a business plan outlining your insurance agency's hiring strategy and a 3 to 5 minute video presentation.

- Each team must consist of two to four high school students.
- Teams will present a creative summary of their business plan in a 3–5 minute video pitch.
- All submissions must be completed through the online submission portal.
- Submissions must be received no later than February 1, 2027, to be eligible for awards.
- All eligible entries will be evaluated to determine the top three submissions.
- Late entries and videos exceeding five minutes will be disqualified.
- Teams must be based in the United States.

TIMELINE

- Entry submissions begin December 7, 2026
- Submission deadline is February 1, 2027
- The top 3 teams will be announced by March 12, 2027
- Each winning team will be presented their official award in person or virtually by a member of the National Invest Team.

BUSINESS PLAN GUIDELINES

- Introduce your agency's mission and vision.
- Identify the key insurance and business professionals you would hire and explain the responsibilities of each role.
- Explain how each role contributes to your agency's growth, innovation, and long-term success.
- Describe what your agency will do to build a strong workplace culture that attracts, develops and retains young talent
- Explain why investors should believe your team is positioned to build a successful forward-thinking agency.

VIDEO PRESENTATION GUIDELINES

Participants will present a creative summary of their business plan in a 3–5 minute investment pitch.

I. Introduction

a. Identify which types of insurance your campaign will focus on and why they are relevant to Gen Z.
b. Identify your target audience, including demographics, region.
c. Describe key marketing strategies your team will use to connect with Gen Z and stand out from traditional insurance messaging.
d. Describe how you will change the perception of insurance from boring and confusing to empowering and essential.

II. Hiring Strategy and Investment Pitch

a. Introduce the key insurance and business professionals you would hire and explain the responsibilities of each role.
b. Describe how your agency will build a strong workplace culture that attracts, develops, and retains Gen Z talent.
c. Explain why your hiring strategy and leadership team position your agency for long-term growth and success.
d. Persuade investors why your agency is a smart investment.

III. Overall Presentation

a. Stay within the 3–5 minute limit.
b. Deliver a professional, persuasive presentation.
c. Use visuals and creativity to strengthen your message.
e. Ensure clear audio and smooth video playback.

BONUS: Interview an insurance professional and incorporate at least one insight or recommendation into your video presentation.

QUESTIONS?

Please reach out to our Invest team
Whitnee Dillard whitnee@investprogram.org or Leslie Richardson leslie@investprogram.org

NOTE TO TEACHERS

If your students produce a winning submission, Invest will also provide a pizza lunch to your classroom in honor of you and the winner(s)!

AWARDS

NATIONAL GRAND PRIZE: $1,500 cash prize

The grand prize-winning team will be featured on the Invest Hall of Fame webpage viewed by insurance business professionals nationwide. In addition, the winning video will be featured on Invest and Invest company partner social media platforms. Lastly, each winner interested in pursuing an insurance career will also be eligible for an Invest classroom to career scholarship. The scholarship will provide a $500 reimbursement for insurance related continued education including insurance pre-licensing courses, certifications, designations and/or collegiate course work focused on insurance and/or risk management. For those interested in pursuing an insurance certification or designation please visit The Institutes and/or The Alliance to learn more.

FIRST PLACE: $1,000 cash prize

The first-place winning team will be featured on the Invest Hall of Fame webpage viewed by insurance business professionals nationwide. In addition, the winning video will be featured on Invest and Invest company partner social media platforms. Lastly, each winner interested in pursuing an insurance career will also be eligible for an Invest classroom to career scholarship. The scholarship will provide a $500 reimbursement for insurance related continued education including insurance pre-licensing courses, certifications, designations and/or collegiate course work focused on insurance and/or risk management. For those interested in pursuing an insurance certification or designation please visit The Institutes and/or The National Alliance to learn more.

SECOND PLACE: $700 cash prize

The second-place winning team will be featured on the Invest Hall of Fame webpage viewed by insurance business professionals nationwide. In addition, the winning video will be featured on Invest and Invest company partner social media platforms. Lastly, each winner interested in pursuing an insurance career will also be eligible for an Invest classroom to career scholarship. The scholarship will provide a $500 reimbursement for insurance related continued education including insurance pre-licensing courses, certifications, designations and/or collegiate course work focused on insurance and/or risk management. For those interested in pursuing an insurance certification or designation please visit The Institutes and/or The Risk and Insurance Education Alliance to learn more.

THIRD PLACE: $500 cash prize

The third-place winning team will be featured on the Invest Hall of Fame webpage viewed by insurance business professionals nationwide. In addition, the winning video will be featured on Invest and Invest company partner social media platforms. Lastly, each winner interested in pursuing an insurance career will also be eligible for an Invest classroom to career scholarship. The scholarship will provide a $500 reimbursement for insurance related continued education including insurance pre-licensing courses, certifications, designations and/or collegiate course work focused on insurance and/or risk management. For those interested in pursuing an insurance certification or designation please visit The Institutes and/or The Risk and Insurance Education Alliance to learn more.

INVEST 2026/2027 REAL WORLD READY INSURANCE CHALLENGE
PRESENTATION EVALUATION FORM

Did the participating team...		Novice	Developing	Proficient	Exemplary	**Judged Score**
BUSINESS PLAN						
1.	Clearly present the agency's mission, vision, insurance focus, and target market.	0	3	7	10	
2.	Explain how the agency will build a workplace culture that attracts, develops, and retains young talent.	0	3	7	10	
3.	Identify the key insurance / business professionals to be hired and clearly explain the responsibilities of each role.	0	3	7	10	
4.	Present a convincing business case demonstrating how the hiring strategy and leadership team position the agency for long-term growth and why investors should fund the agency.	0	3	7	10	
BONUS	*Interview an insurance professional and incorporate at least one meaningful insight or recommendation into your business plan. Be sure to include the insurance professional's name, job title and company.*	*0*			*5*	
	Total Points in this Section including BONUS				***45***	

INVEST 2026/2027 REAL WORLD READY INSURANCE CHALLENGE
PRESENTATION EVALUATION FORM

VIDEO PRESENTATION						
6.	Describe how the agency's marketing strategy will attract Gen Z talent, promote insurance careers, attract Gen Z customers, and contribute to the agency's long-term success.	0	3	7	10	
7.	Clearly communicate the agency's mission, vision, insurance focus, target market, and hiring strategy while effectively summarizing the business plan.	0	5	10	15	
8.	Deliver a professional presentation that is creative, well-organized, uses effective visuals, demonstrates strong communication skills, and stays within time limit.	0	5	10	15	
5.	Present a compelling and persuasive investment pitch that demonstrates how the agency's hiring strategy positions the agency for long-term success and why investors should fund the agency.	0	5	15	20	
BONUS	*Feature the insurance professional you interviewed by including a video clip or photo of them in your video. Incorporate at least one meaningful insight or recommendation from the interview and explain how it influenced your agency's business plan, hiring strategy or overall vision.*	0	N/A	N/A	5	
	Total Points in this Section including BONUS				***65***	
	Total Overall Points				**110**	