

Engage fi Partners with Wake Forest University School of Business Scholars Program

Ten-month collaboration will explore cross-generational communication and support the development of future business leaders

Orlando, FL, September 29, 2026 — Engage fi, a national consulting firm specializing in banking technology and strategy, today announced a new partnership with the Scholars Program within the Allegacy Financial Center for Leadership and Character at Wake Forest University School of Business.

Through the ten-month collaboration, Wake Forest business students from the Master of Science in Accountancy, Master of Science in Business Analytics, and Master of Science in Management programs will work with Engage fi on a cross-generational communication initiative. The scholars will study how Engage fi employees across levels and generations communicate, collaborate, and develop one another, identifying opportunities to strengthen connection, engagement, and organizational effectiveness as the company continues to grow.

The scholars will engage with team members throughout Engage fi through interviews and surveys, gaining firsthand exposure to a fast-growing organization and the leadership considerations that accompany growth. At the conclusion of the project, they will present a report readout and practical playbook with findings and recommendations for Engage fi leadership.

Wake Forest selects scholars through a competitive, award-based process. The program combines real-world organizational experience with executive coaching, mentoring, and leadership development. “Investing in younger generations and creating opportunities for mentorship and shared learning is an important way we can give back and help develop the business leaders of tomorrow,” said Andres Pasantes, President & CEO of Engage fi. “We are equally excited to learn from the scholars’ perspectives as they help us better understand how we continue building an even stronger, more connected organization.”

“We are excited to partner with Engage fi to give our scholars the opportunity to apply what they are learning in a real-world organization while contributing meaningful insights along the way,” said Pat Sweeney, Executive Director, Allegacy Financial Center for Leadership and Character at Wake Forest University, School of Business. “Experiences like this allow our students to learn directly from experienced leaders and explore the dynamics of today’s workforce, while developing the skills they will need to lead effectively throughout their careers.”

Virginia Heyburn, Director of Insights & Advocacy, and Courtney Sanderfer, Vice President of People & Culture, will jointly lead the collaboration for Engage fi. They will work alongside six

senior executives as Executive Affiliates of Wake Forest's Allegacy Financial Center for Leadership and Character. They will coach and mentor the scholars through monthly enrichment sessions, building on their ongoing leadership and culture-development work with Engage fi's People & Culture team.

The partnership reflects Engage fi's commitment to investing in its people, strengthening its culture, and supporting the next generation of leaders.

About Engage fi

Engage fi is a technology-enabled consulting and advisory firm helping banks and credit unions make smarter, faster technology and vendor decisions. Backed by more than 2,700 successful engagements, the firm delivers strategic advisory, technology evaluations, contract negotiations, and vendor benchmarking, along with end-to-end support across core, digital, payments, CRM, AI, integrated communications, and merger and acquisition initiatives.

Engage fi also provides fully managed conversion, migration, merger, and implementation services, powered by proprietary platforms including 360fi Workflow and DataFusion. By combining deep industry expertise, automation, and proven execution, Engage fi helps financial institutions modernize operations, reduce risk, and achieve measurable business outcomes. Learn more at www.engagefi.com.