IMCA Is Now Investments & Wealth Institute, Expands Comprehensive Educational Offerings

By Greta Gloven

IMCA is now Investments & Wealth Institute™. As part of a multi-stage strategic plan focused on positioning the organization for the future, IMCA has changed its name to Investments & Wealth Institute (the Institute). The rebrand is key to facilitating the plan’s objectives for the Institute based on GEARs: Grow, Educate, Add Value, Relevance, and Standards.

“We’ve undertaken this change at a time of tremendous strength. For more than three decades, our organization has been at the forefront of investment and wealth management education, and the expectation for advanced knowledge and professionalism in the industry is rising,” said Scott Thayer, CIMA®, board chair. “We’re here to meet that growing need. Our new name more accurately reflects who we are and what we do, as well as elevates the Institute’s mission by recognizing the contributions we’ve made to the profession’s body of knowledge and our commitment to increase public trust and improve outcomes for investors.”

Members can expect to see the same high-quality educational offerings along with new courses and more options for live and online learning. Certification requirements for the Certified Investment Management Analyst® (CIMA®) and Certified Private Wealth Advisor® (CPWA®) designations have not changed. In addition, a number of benchmark studies are underway to substantiate the importance and value of the CIMA and CPWA credentials for individuals and teams, and how these credentials meet the expectations of high-net-worth investors. A new website—www.investmentsandwealth.org—will be unveiled in late 2017.

“Since 1985 we have established and enforced high standards for advanced practitioners, delivering premier education that offers a unique blend of Ivy League-level expertise and practical application,” said Sean Walters, CEO. “Investments & Wealth Institute will continue to enhance the competency and professionalism of advice delivered to the public. This rebrand re-focuses our identity toward our primary objective, which is to develop and certify ethical, competent professionals to provide clients with comprehensive strategies and advice on how to navigate their investments, and how to grow, preserve, and transfer wealth.”

As part of the rebranding effort, IMCA Australia is now the CIMA Society of Australia and the New York chapter is the Investments & Wealth Society of New York.

EXPANDED COLLABORATION WITH YALE SCHOOL OF MANAGEMENT

The Yale School of Management has expanded its collaboration with the Institute and is launching an online CPWA Certification Program beginning in early 2018. CPWA certification is the premier wealth management credential created specifically for professionals working with high-net-worth clients.

The University of Chicago Booth School of Business has delivered the education requirement for CPWA certification since 2008, currently offering an in-depth, in-person executive education experience.

ACQUISITION OF THE RETIREMENT MANAGEMENT ADVISOR DESIGNATION

The Institute also has made a strategic acquisition of the Retirement Management Advisor℠ (RMA℠) designation to enhance its existing education offerings and add curriculum for retirement income planning and retirement management. Formerly administered by the Retirement Income Industry Association since 2006, the RMA designation offers a holistic approach to retirement income planning structured within a client-centered fiduciary model (The Procedural Prudence Map℠). The program gives advisors practical tools, techniques, and methodologies that guide decision-making. The result is a set of knowledge and skills that can satisfy clients’ retirement income needs and wants in compliance with the industry’s increasing regulations.

INVESTMENT IN TECHNOLOGY

To better serve members, improve user experience, and meet the needs of its strategic plan, the Institute is making a significant investment in technology with the scheduled launch of a new website, integration of a new Online Learning Center, and a refocused site for investors—www.InvestmentHelp.org.

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