New Certification Opportunities

NEW OPPORTUNITIES CHALLENGE PARTICIPANTS TO EXCEL AND BETTER SERVE CLIENTS

In the increasingly competitive global market, Investments & Wealth Institute is providing two new opportunities for ambitious advisors to earn professional designations that will advance their careers and help them better serve clients.

- The Wealth Management Accelerator Pathway starts September 1, 2021, and offers a structured three-month program to complete the Certified Private Wealth Advisor® (CPWA®) designation.
- The Fall 100-Day Advisor Challenge begins September 20, 2021, and offers participants an opportunity to earn the Retirement Management Advisor® (RMA®) designation before the end of 2021.

NEW STRUCTURE

These new opportunities for certification provide structured, accelerated pathways to the Institute’s advanced credentials, which are valuable to advisors and their clients alike.

The Wealth Management Accelerator Pathway is 14 weeks of pre-planned, one-hour modules accompanied by on-demand presentations and videos. After completing the online, on-demand independent study, candidates will attend the two-and-one-half-day CPWA in-person intensive workshop with program faculty, December 6-8, 2021, in Austin, Texas. The in-person workshop emphasizes practice exams, case studies, and targeted lectures to prepare candidates for passing the CPWA certification exam.

During the Fall 100-Day Advisor Challenge, challenging advisors will complete the on-demand self-study program, which includes academic exercises, case-study reviews, and thought-provoking online discussions, and will attend check-in calls and webcasts with faculty. The program ends with the Virtual Capstone event and a rigorous three-hour, 100-question online-proctored exam. Advisors who pass the exam will earn the RMA credential.

COSTS

The Accelerator Pathway costs $5,995 and includes the test prep kit—the CPWA Accelerator Pack—a $495 value. The pack provides practice case-study questions, study materials, free test retakes (if needed), and printed materials.

Fall Advisor Challengers pay $1,995 with special promo code FALL100AC. The price includes the online course, the capstone, and the first examination attempt.

- Apply by August 25, 2021, to join the Wealth Management Accelerator Pathway
- Apply by September 13, 2021, to become a Fall 100-Day Challenger

For more information visit:
- Wealth Management Accelerator Pathway: https://content.investmentsandwealth.org/advisor-challenge
- Fall 100-Day Advisor Challenge: https://content.investmentsandwealth.org/advisor-challenge

RECENT CIMA® AND RMA® CERTIFICANTS

The following individuals recently earned the CIMA® certification:
- Stella Ann, Merrill Lynch, Huntington, NY
- Mary Allen, The Vanguard Group, Norristown, PA
- William Allen, Wells Fargo Advisors, Raleigh, NC
- Anthony Alf, LPL Wealth Advisors, New York, NY
- Roger Bab, The Financial Council, Austin, TX
- Anthony Balboa, Lord Abbott, Grand Rapids, MI
- Patrick Barnworth, Washington Trust Bank, Spokane, WA
- María Bastida, FLC Capital Advisors, Palm Desert, CA
- Paul Bowman, Merrill Lynch, Oak Brook, IL
- Maria Bautista, FLC Capital Advisors, Palm Desert, CA
- Patrick Bannworth, Washington Trust Bank, Spokane, WA
- Roger Bair III, The Financial Consulate, Hunt Valley, MD
- Andrew Ark, Lenox Wealth Advisors, New York, NY
- William Allen, Wells Fargo Advisors, Raleigh, NC
- Marya Allen, The Vanguard Group, Norristown, PA
- Tanja Krakovic, Bank of America Merrill Lynch, Gardena, CA
- Adam Kleiman, GQG Partners, Bryn Mawr, PA
- Noah Killingsworth, Franklin Templeton, St. Petersburg, FL
- Andrew Jones, Wells Fargo Asset Management, Menomonee Falls, WI
- Justin Kuehne, FLY Group, New York, NY
- Joseph Tierney, Carillon Tower Advisers, Menomonee Falls, WI
- Robert Molard, Edward Jones, Fort Worth, TX
- Nicholas Bank, Burks Consulting, Beverly, PA
- Katharine Christian, Baird, Houston, TX
- Heather Churchill, Morgan Stanley, Orlando, FL
- Michaela Muldoon, Merrill Lynch, Miami, FL
- Leslie Meissner, MassMutual, Southfield, MI
- Robert Monte, Monte Financial Group, Turlock, CA
- Larry Porchon, Optimum Retirement Planning, Chicago, IL
- David Roberts, Vista Financial Services, Lansing, MI
- Adam Rude, LDR Planning Group, Purchase, NY
- Zachary Salka, Bank of America Merrill Lynch, Paramus, NJ
- Fred Schellpeker, Sundance Investments LLC/Seaboard Advisors PA, Norwalk, NE
- Nickolas Bank, Burks Consulting, Beverly, PA
- Katharine Christian, Baird, Houston, TX
- Heather Churchill, Morgan Stanley, Orlando, FL
- Michaela Muldoon, Merrill Lynch, Miami, FL
- Leslie Meissner, MassMutual, Southfield, MI
- Robert Monte, Monte Financial Group, Turlock, CA
- Fred Schellpeker, Sundance Investments LLC/Seaboard Advisors PA, Norwalk, NE

The following individuals recently earned the RMA® certification:
- Nicholas Bank, Burks Consulting, Beverly, PA
- Katharine Christian, Baird, Houston, TX
- Heather Churchill, Morgan Stanley, Orlando, FL
- Michaela Muldoon, Merrill Lynch, Miami, FL
- Leslie Meissner, MassMutual, Southfield, MI
- Robert Monte, Monte Financial Group, Turlock, CA
- Zachary Salka, Bank of America Merrill Lynch, Paramus, NJ
- Fred Schellpeker, Sundance Investments LLC/Seaboard Advisors PA, Norwalk, NE
- Nickolas Bank, Burks Consulting, Beverly, PA
- Katharine Christian, Baird, Houston, TX
- Heather Churchill, Morgan Stanley, Orlando, FL
- Michaela Muldoon, Merrill Lynch, Miami, FL
- Leslie Meissner, MassMutual, Southfield, MI
- Robert Monte, Monte Financial Group, Turlock, CA
- Fred Schellpeker, Sundance Investments LLC/Seaboard Advisors PA, Norwalk, NE

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