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**, challengers 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/wm_accelerator_program
- Fall 100-Day Advisor Challenge: https://content.investmentsandwealth.org/advisor-challenge_fall

RECENT CIMA® AND RMA® CERTIFICANTS

The following individuals recently earned the CIMA® certification

Stefano Airo, Merrill Lynch, Huntington, NY
Marya Allen, The Vanguard Group, Norristown, PA
William Allen, Wells Fargo Advisors, Raleigh, NC
Andrew Ark, Lenox Wealth Advisors, New York, NY
Roger Bair III, The Financial Consulate, Hunt Valley, MD
Anthony Balboa, Lord Abbett, Grand Rapids, MI
Patrick Bannworth, Washington Trust Bank, Spokane, WA
Maria Bautista, FLC Capital Advisors, Palm Desert, CA
Paul Bowman, Merrill Lynch, Oak Brook, IL
David Cacciabeve, CAPTRUST, Easton, PA
Andrew Coco, COCO Enterprises, Whitefish, MT
Kyle Coffey, Capital Group, Charlotte, NC
John Cullen, Eaton Vance, Marshfield, MA
Sebastian Eccles, Life Line Wealth Mgmt., Los Angeles, CA
Rachel Few, JP Morgan Asset Mgmt., Chicago, IL
Zachary Fiandt, Lake City Investments/Cetera Investment Services, Fort Wayne, IN
José Fidalgo Cordova, Kovack Securities, San Juan, PR
James Fleming, Pension Benefit Guaranty Corp., Washington, DC
Justin Giakas, J.P. Morgan, New York, NY
Curtis Goldsmith, Franklin Templeton Investments, Sacramento, CA
Michael Grinnell, Merrill Lynch, San Francisco, CA
Jonah Hewett, State Street Global Advisors, Boston, MA
Jessica Johanson, Lord Abbett, Chicago, IL
Andrew Jones, Wells Fargo Asset Mgmt., Menomonee Falls, WI
Sean Kearns, Morgan Stanley, Great Falls, VA
Noah Killingsworth, Franklin Templeton, St. Petersburg, FL
Soyoung Kim, J.P. Morgan, Miami, FL
Adam Kleiman, GQG Partners, Bryn Mawr, PA
Tanja Krakovic, Bank of America Merrill Lynch, Gardena, CA
Daryl Lipkin, UBS Financial Services, East Brunswick, NJ
Bryson Livingston, BlackRock, Philadelphia, PA
Michael Macco, Macco Financial Group, Green Bay, WI
Jennifer Matthews, McNaughton Wealth Mgmt., Menifee, CA
Ryan McCarthy, Columbia Threadneedle Investments, Boston, MA
Matthew McDonnell, Delta Capital Advisors, Maple Grove, MN
Dipen Mehta, Invst LLC, Lake Elmo, MN
Robert Molard, Edward Jones, Fort Worth, TX
Arun Nanjappa, Invesco, Fulshear, TX
Caroline Nixon, Neuberger Berman, Venetia, PA
Stephen Philip, Zacks Investment Mgmt., Chicago, IL
John Polivka, Merrill Lynch, Houston, TX
Michael Schrampf, Regions Bank, Nashville, TN
Joseph Tierney, Carillon Tower Advisers, Minneapolis, MN
Hailey Van Avery, UBS Financial Services, Everett, WA
Ryan Wells, Equitable Advisors, Houston, TX
Reweti Wiki, Wells Fargo Advisors, Roseville, CA
Sammy Williams, J.P. Morgan Chase, Valley Stream, NY

The following individuals recently earned the RMA® certification:

Nicholas Bunio, Bunio Consulting, Berwyn, PA
Katharine Christian, Baird, Houston, TX
Heather Churchill, Morgan Stanley, Orlando, FL
Maribel Maldonado, Merrill Lynch, Miami, FL
Leslie Meisner, Mosaic Fi, Scottsdale, AZ
Robert Monte, Monte Financial Group, Guilford, CT
Larry Pershing, Optimum Retirement Planning, Chicago, IL
David Roberts, Vima Financial Services, Lansing, MI
Adam Rude, LOB Planning Group, Purchase, NY
Zachary Saksa, Bank of America Merrill Lynch, Pennington, NJ
Fred Schellpeper, Sundance Investments LLC/Silverleaf Advisors RIA, Norfolk, NE
Brody Schoen, Capital Group, Greenfield, IN
Patrick Shannon, Sr., Wells Fargo Advisors Wealth Mgmt., San Francisco, CA
Carla Voss Genelly, Sanctuary Wealth Advisors, Chicago, IL
Myrrica Valentine, Doussard Financial, Mount Vernon, WA