

RECENT CIMA® CERTIFICANTS

**THE FOLLOWING
INDIVIDUALS RECENTLY
EARNED THE CIMA®
CERTIFICATION**

- James Ade, Jr., Merrill Lynch, Downingtown, PA
 Andrew Aiello, Franklin Templeton, St. Petersburg, FL
 Thomas Anderson, HD Vest Investment Service, Glencoe, MN
 Khalil Andraos, Merrill Lynch, Reston, VA
 Steve Angelone, Columbia Threadneedle Investments, Boston, MA
 Shyan Ardalan, Merrill Lynch, Los Angeles, CA
 Alvaro Arias, Miami, FL
 Samuel Awa, The Ayco Company, Clifton Park, NY
 Daniel Baccarini, Beacon Capital Mgmt., Navarre, FL
 Raisa Barkaloff, Federated Investors, Pittsburgh, PA
 Nicholas Battalini, Calamos Investments, Naperville, IL
 Mitchell Behm, Merrill Lynch, Irvine, CA
 Petter Bialek, Oppenheimer Funds, Ramsey, NJ
 Michael Bitton, Pacific Life, Charlotte, NC
 Timothy Black, PNC Institutional Asset Mgmt., Waukesha, WI
 Stephanie Blain, Merrill Lynch, Boston, MA
 Alfonso Boneta, UBS Financial Services, San Juan, PR
 Jeffrey Borman, LOC Investment Advisers, South Charleston, WV
 John Borum II, Wells Fargo Advisors, New York, NY
 William Brady, Milliman Financial Risk Mgmt., Chicago, IL
 Wendy Brennan, J.P. Morgan Asset Mgmt., Chicago, IL
 Edward Brezenski III, Wells Fargo Advisors, Omaha, NE
 Ryan Bridge, Franklin Resources, St Petersburg, FL
 Kyle Brown, Guggenheim Investments, Chicago, IL
 Keith Bruni, Lincoln Investment, Palm Beach Gardens, FL
 Katherine Buescher, JPMorgan Chase & Co., Chicago, IL
 Jason Burriss, Merrill Lynch, Chicago, IL
 David Butler, Janus Capital Group, Denver, CO
 Cristofer Cabanillas, Monterey Private Wealth, Monterey, CA
 Andrew Carnevale, Aberdeen Asset Mgmt., Philadelphia, PA
 Joseph Cefalu, Merrill Lynch Private Banking & Investment Group, Boston, MA
 Daniel Chapman, Raymond James & Associates, Coral Gables, FL
 Tyler Church, Morgan Stanley, Vancouver, WA
 Kent Clark, USAA Financial Advisors, Chicago, IL
 Laura Clark, Merrill Lynch, Mt. Pleasant, SC
 Michael Clark, American Funds Distributors, Ballwin, MO
 Kevin Coffey, BBVA Compass Investment Solutions, Montgomery, AL
 Darren Colananni, Merrill Lynch, Washington, DC
 Ryan Coleman, Oppenheimer Funds, Lake Oswego, OR
 Chad Crawford, Cornerstone Mgmt., Peachtree Corners, GA
 Brian Cullen, Baron Capital, Reston, VA
 Natalie Dewez, ANZ, Sydney, Australia
- Brendan Duffy, Merrill Lynch, Ridgefield, CT
 Devin Ekberg, Investments & Wealth Institute, Greenwood Village, CO
 Joseph Epstein, Franklin Templeton, St. Petersburg, FL
 Joel Evenhouse, Janus, Traverse City, MI
 Charles Fagan, BlackRock, Havertown, PA
 Chandra Federle, Merrill Lynch-PBIG, Chicago, IL
 Eric Fenger, Franklin Templeton Investments, St. Petersburg, FL
 Cornell Fields, Prudential Financial, Yardley, PA
 Jessica Ford, T. Rowe Price, Dallas, TX
 Travis Frayard, UBS Financial Services, Lafayette, LA
 Michael Fredrick, Deutsche Asset Mgmt., Danville, CA
 Timothy Frost, Invesco, Frisco, TX
 Michael Furey, Delta Research & Advisory, City East, Queensland, Australia
 Joseph Gallemore, Spire Wealth Mgmt., McLean, VA
 David Gardiner, Merrill Lynch, Bloomfield Hills, MI
 Tyler Ghingher, T. Rowe Price, Baltimore, MD
 Daniel Gibson, Merrill Lynch, Dallas, TX
 James Gomas, Merrill Lynch, Celebration, FL
 Jorge Gomez del Campo, Merrill Lynch, Tucson, AZ
 Michael Graf, Ameriprise, Minneapolis, MN
 Ann Greenberg, HighPoint Planning Partners, Chicago, IL
 Jeff Greiber, Russell Investments, Menomonee Falls, WI
 Theodore Grigsby, Human Investing, Lake Oswego, OR
 Ronald Gruninger, Signature Wealth Advisors, Orlando, FL
 Stephen Hales, St. Petersburg, FL
 Douglas Hanna, Wells Fargo, St. Louis, MO
 Zahya Hantz, Edward Jones, Stamford, CT
 Kyle Hardin, Invesco, Chicago, IL
 Bradley Hargrave, Prudential Investments, Indianapolis, IN
 Zachariah Harney, Merrill Lynch, Carmel, CA
 Ryan Harrison, Merrill Lynch, Levittown, PA
 Andrew Hartley, Northern Trust, Marietta, GA
 Glenn Harvey, BNY Mellon, Locust Valley, NY
 Matthew Hashimoto, PNC Wealth Mgmt., Parkton, MD
 Stephen Hawkins, Resolute Investment Managers, Irving, TX
 David Henry, Capital Group, Carmel, IN
 Joseph Hinojosa, Pioneer Investments, Houston, TX
 Su Hu, Q Super, Brisbane, Australia
 Jose Hualpa, JP Morgan Securities, Sunnyside, NY
 Ronald Huang, HSBC, Philadelphia, PA
 Kevin Hurley, T. Rowe Price, Owings Mills, MD
 Kevin Ip, Merrill Lynch, New York, NY
 Michael Itani, John Hancock Investments, Melrose, MA
 Fahad Jamil, Vanguard, Cherry Hill, NJ
 Brett Jensen, Sagemark Consulting, Salt Lake City, UT
 Anthony Kafourous, Principal Financial Group, Concord, CA
 Eric Keller, First Command Financial, Arlington, TX
 Matthew Kitz, Glen Rock, NJ
 Alexander Knight, Natixis Investment Managers, Roswell, GA
- Todd Kowalski, Morningstar, Ponte Vedra, FL
 Christopher Lancot, Capital Group, Indianapolis, IN
 Flavio Landivar, Raymond James, Miami, FL
 Benjamin Lau, Avant Mutual, Sydney, Australia
 Kevin Leonard, Merrill Lynch, Waxhaw, NC
 Mark Leslie, Refin Pty Ltd., Fairlight, Australia
 Robbie Lew, Hawthorn, Australia
 Austin Lewis, TD Ameritrade, Fort Worth, TX
 Brian Lore, Ivy Investments, Overland Park, KS
 Nicholas Loring, Loring Advisory Group, Greenville, RI
 Robert Loring, Merrill Lynch, Hingham, MA
 Kevin Ly, Wells Fargo & Company, Minneapolis, MN
 John Macielag, Merrill Lynch, Rock Hall, MD
 Jack Madryga, T. Rowe Price, Owings Mills, MD
 Scott Martin, Kingsview Asset Mgmt., Chicago, IL
 Jonathan Marville, Franklin Templeton Investments, St. Petersburg, FL
 Jesse Masterson, UBS Financial Services, Rockland, MA
 Lindsay Matchett, Calamos, Geneva, IL
 Christian Mauter, Resource Planning Group, Atlanta, GA
 Andrae Mayo, DuPont Capital, Wilmington, DE
 Steven McCarthy, BlackRock, Princeton, NJ
 Jorge McNabb, Wilmington Trust, Aberdeen, MD
 Jonathan McPharlin, J.P. Morgan, Barrington, IL
 Christopher Meeske, Gerstein Fisher, Waldwick, NJ
 Joseph Meklin, Merrill Lynch, Fort Washington, PA
 Debbie Michaelson, Oppenheimer Funds, Chicago, IL
 Benjamin Miller, UBS Financial Services, Barrington, IL
 Dominick Minicucci, UBS Financial Services, New York, NY
 Alfredo Miranda, Camden Wealth Advisors, Houston, TX
 Thomas Moody, Wakefield Asset Mgmt., Englewood, CO
 Brandon Moore, Oppenheimer Funds, Centennial, CO
 Greg Moro, T. Rowe Price, Owings Mills, MD
 Dean Morris, Dorsey & Company, Kalispell, MT
 David Morrison, Capital Group, Lake Forest, IL
 Rian Morrissey, Oppenheimer Funds, Lawrence, KS
 Gerald Mostlander, J.P. Morgan Asset Mgmt., Suamico, WI
 Paul Murray, Merrill Lynch, Northbrook, IL
 Corey O'Connor, Eaton Vance Investment Mgmt., Quincy, MA
 Kevin Olson, Capital Group, Noblesville, IN
 Alejo Orvananos, Merrill Lynch, Houston, TX
 Margaret Parker, Merrill Lynch, Athens, GA
 William Parsley, American Funds, Parkville, MO
 Patricia Parsons, Christopher Street Financial, New York, NY
 William Patterson, Capital Group, Baton Rouge, LA
 Robert Peche, American Funds, Los Angeles, CA
 William Pello, Merrill Lynch, Madison, CT
 William Perrone, DuPont Capital Mgmt., Wilmington, DE
 Jeffrey Perry, PFG Private Wealth Mgmt., Lutz, FL
 Bareq Peshtaz, Morgan Stanley, Seattle, WA
 Chad Petherick, BMO, Appleton, WI
 Matthew Pickard, Franklin Templeton Investments, Rancho Cordova, CA
 Giancarlo Plati, John Hancock Investments, Boston, MA
- Melanie Powell, Merrill Lynch, Paramus, NJ
 Andrew Prupas, Franklin Templeton, Kentfield, CA
 Domenic Qualtieri, Oppenheimer Funds, New York, NY
 Brandon Radach, John Hancock, River Forest, IL
 Nicholas Raffin, Merrill Lynch, New York, NY
 Mark Ramsey, LPL Financial, Andover, MA
 Michael Rao, Fidelity Investments, Fairfield, CT
 Terrence Regan, Morgan Stanley, Cincinnati, OH
 Benjamin Rich, Fidelity Investments, Atlanta, GA
 Stanley Robare, Robare & Jones Asset Managers, Houston, TX
 Jason Robertson, Janus Henderson Investors, Denver, CO
 Jared Rogers, BlackRock, Princeton, NJ
 Kaitlyn Ross, Federated Investors, Pittsburgh, PA
 David Rowe, Highland Capital Advisors, Cle Elum, WA
 Alfredo Sanchez, BB&T Securities, Hialeah, FL
 Steven Sassack, U.S. Trust, Melville, NY
 Justin Sanderson, Sanderson Wealth Mgmt., Buffalo, NY
 Christopher Sands, Manning & Napier, Fairport, NY
 Evan Sassack, Merrill Lynch, Grand Rapids, MI
 Kimberly Schneider, New York Life/MainStay Investments, Tampa, FL
 Matthew Schradly, Ameriprise Financial, San Diego, CA
 Adrian Schulz, JPMorgan, San Diego, CA
 James Sewell, III, Capital Group, Westlake Village, CA
 Jae Shin, T. Rowe Price, Monument, CO
 Justin Sidhu, JP Morgan, Seattle, WA
 Alexander Siele, Morgan Stanley, Beverly Hills, CA
 Nicholas Simmons, Merrill Lynch, Miami, FL
 Melissa Sloane, Capital Group, Delray Beach, FL
 Peter Sobel, Dreyfus Advisor Services, Uniondale, NY
 Curtis Steube, UBS Financial Services, Columbus, OH
 Wynne Stuart, Janus Henderson Investors, Denver, CO
 John Sulzicki, American Funds, Seattle, WA
 Sean Swager, Franklin Templeton, St. Petersburg, FL
 Richard Taborda, LBT Wealth Mgmt., Iselin, NJ
 Ivor Tan, UOB Kay Hian Private Limited, Singapore
 Nathan Taves, T. Rowe Price, Dublin, OH
 Alba Tedone, USI Advisors, Greenwood Village, CO
 Joao Teixeira, PFG Private Wealth Mgmt., Lutz, FL
 Vincent Toscano, Lincoln Financial Advisors, Douglaston, NY
 Daryl Tracy, MFS Investment Mgmt., South Easton, MA
 Ian Travers, Fidelity Investments, Smithfield, RI
 Brenton Uhlenhopp, Principal Funds, Urbandale, IA
 Scott Ursin-Smith, Capital Group Companies, Pacific Palisades, CA
 Camilo Vilchez, J.P. Morgan Securities, Miami, FL
 Scott Warden, Jr., Franklin Templeton, Sacramento, CA
 Richard Webb, Principal Global Investors, Jefferson, IA
 Robert Wheatley, MFS Investment Mgmt., Cambridge, MA
 Jeremy Whitt, Regency Investment Advisors, Fresno, CA
 Matthew Wigren, Alden Capital Mgmt., Bellevue, WA
 Marcus Williams, JPMorgan, Westerville, OH
 Stephen Williams, Edward Jones, Hendersonville, TN
 Michael Wise, Morgan Stanley, Chicago, IL
 Peter Wittry, Russell Investments, Milwaukee, WI
 Tracy Wright, AXA 1290 Funds, Fair Lawn, NJ
 Trevor Yochum, Triad Advisors, Norcross, GA