RECENT CIMA® AND CPWA® CERTIFICANTS

The following individuals recently earned the CIMA® certification:

Jason Adams, Regions Private Wealth, Orlando, FL
Guillermo Alberto, Baystate Financial, Westford, MA
Thomas Arcuri, SageView Advisory, Scottsdale, AZ
James Arizini, John Hancock, Baton Rouge, LA
Andrew Arnold, First Security Bank, Bryant, AR
Greg Ashcroft, Baird, Houston, TX
Lauren Bauer, Merrill Lynch, Erie, PA
William Beattie, Eaton Vance, Delray Beach, FL
Pierre Begin, Amundi Pioneer Asset Mgmt., Issaquah, WA
Jerry Berg, Capital Group, Los Angeles, CA
David Berry, Ameriprise Financial, Clearwater, FL
Trent Blossom, MFS Investment Mgmt., Arlington, MA
Todd Brandstadt, Benjamin F. Edwards & Co., Grand Rapids, MI
Michael Breen, Natixis Investment Managers, Boston, MA
Robert Brooks, JFS Wealth Advisors, Hermitage, PA
Edward Brown, Jr., Capital Group, Lookout Mountain, TN
Maxwell Camp, Brinker Capital, Newtown Square, PA
John Canning, Fifth Third Private Bank, Arrington, TN
Caroline Carley, Invesco, Fort Lauderdale, FL
Justin Carpenito, Morgan Stanley, Seattle, WA
Heather Churchill, Morgan Stanley, Orlando, FL
Alex DaPron, Capital Group, Dallas, TX
Jonathan Davis, John Hancock Investment Mgmt., Boston, MA
Kristen Davis, Merrill Lynch, Coraopolis, PA
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Andrew Dilbone, Touchstone Securities, Denver, CO
Jeremy Downin, Edward Jones, Galesburg, IL
Cristian Ensley, Nationwide, Jeffersonville, IN
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Aaron Fant, UBS Financial Services, Hoboken, NJ
Anthony Farinaro, Invesco, Chicago, IL
Steven Fernandez, JPMorgan, Millstone, NJ
Michael Fernandez Vazquez, Popular Securities, San Juan, PR
Joshua Fey, Ivy Investments, Overland Park, KS
Justin Fletchall, RBC Wealth Mgmt., Madison, WI
Zachary Forster, Janus Henderson Investors, Denver, CO
John Fuggi, Legg Mason Investor Services, Indianapolis, IN
Marisol Fung, Dynamic Wealth Advisors, Chandler, AZ
Jordan Gaudio, J.P. Morgan Asset Mgmt., Armonk, NY
Christopher Gauthier, Proactive Financial Solutions 360, Rehoboth, MA
Tyler Geik, Ameriprise Financial Services, Chicago, IL
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George Henderson, Comerica Securities, Phoenix, AZ
Jeffery Howard, Stifel, Mobile, AL
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Maurice Jadah, Capital Group, San Clemente, C
Michael Jaso, Eaton Vance, Windermere, FL
Kimberly Jenkins, Beacon Wealth Consultants, Roanoke, VA
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Jacob Keehn, Capital Group, Indianapolis, IN
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Christopher King, Invesco, Houston, TX
Jeffrey Kragen, Merrill Lynch, Alamo, CA
Vyacheslav Kuzmin, TIAA, Brooklyn, NY
Christopher LaBounty, Manning & Napier, Farmington, NY
Madalena Lala, New York Life Investments, New York, NY
John LeRose, Morgan Stanley, Milwaukee, WI
Ryan Liddell, Raymond James, Clarence, NY
Carly Long, John Hancock Investment Mgmt., San Jose, CA
Jeff Lowrie, Capital Group, Carmel, IN
Matthew Maloy, Cetera Advisor Networks, Helena, MT
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Evan Martin, UBS Financial Services, Houston, TX
Mark Mascarenhas, Northwestern Mutual, Brookhaven, GA
Lauren Matteo, Principal Global Investors, Minneapolis, MN
Andrew Maupin, Ivy Investments, Liberty, MO
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James McCormick, Davenport and Company, Williamsburg, VA
Richard Meadows, Wells Fargo Advisors, Lakeland, FL
Britney Melvin, Capital Group, Los Angeles, CA
Matthew Meyers, Meyers Wealth Mgmt., Columbus, OH
Galina Mishina, Boston Private, Beverly Hills, CA
Fabian Modena, Horwath HTL, Hergiswil, Switzerland
Brian Montanez, Multnomah Group, Orinda, CA
Justin Moon, T. Rowe Price, Colorado Springs, CO
Gordon Nesbit, Hurlow Wealth Mgmt. Group, Bloomington, IN
Chris Nightengale, Franklin Templeton, Seminole, FL
Douglas O'Connor, J.P. Morgan, North Kingstown, RI
Mark Patsy, Federated Hermes, Wylie, TX
Timothy Paul, Gator Trading Partners, Elmhurst, IL
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Donald Ponder, Invesco, Keller, TX
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Christopher Snow, Baron Capital, East Rockaway, NY
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Taylor Stewart, RBC Wealth Mgmt., Chevy Chase, MD
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The following individuals recently earned the CPWA® certification:

Francis Abella, Merrill Lynch Wealth Mgmt., Napa, CA
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Kashif Ahmad, City National Rochdale, Freehold, NJ
Garrett Baker, Fidelity Investments, Pleasant Hill, CA
Peter Baldeo II, Merrill Lynch, Princeton, NJ
Jay Beaulieu, Wells Fargo Advisors, Berwyn, PA
Seth Bergquist, Charles Schwab, Phoenix, AZ
David Booker, Capitol Financial Solutions, Raleigh, NC
Alberto Boulton, Bank of America, Miami, FL
Andrew Britton, Wells Fargo Advisors, Fort Lauderdale, FL
Dana Cahan, Altair Advisers, Glencoe, IL
Vicky Campbell, Raymond James & Associates, Oswego, IL
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Jonathan Chasen, Wells Fargo Advisors, Charlottesville, VA
Henry Chau, WestPac Wealth Partners, San Ramon, CA
William Clinton, Jr., Edward Jones, Chester, NJ
Peter Cork, Wells Fargo Advisors, New York, NY
Aaron Crowley, RBC Wealth Mgmt., Tucson, AZ
Will Decker, Decker Wealth Mgmt., Franklin, TN
Jessica Dillon, Grinnell State Bank/Cambridge Advisors, Grinnell, IA
Jerett DiMarzio, Cornerstone Wealth Group, Huntersville, NC
Ryan Divers, TD Ameritrade, Brooklyn, NY
Harshal Doshi, UBS Financial Services, El Segundo, CA
Benjamin Dunbar, Gerber Kawasaki, Manhattan Bach, CA
Jason Exley, Wells Fargo, Bloomington, MN
Kelcy Flores, Capital Advisors, Tulsa, OK
Caroline Galbraith, HawsGoodwin Wealth, Franklin, TN
Joshua Garfin, Fidelity Investments, Albuquerque, NM
Matthew Gehring, Charles Schwab, Denver, CO
Tomas Geoghegan, Beacon Hill Private Wealth, Summit, NJ
Gregory Giardino, J.M. Franklin & Company, Hillsdale, NJ
Catherine Goel, Relative Value Partners, Northbrook, IL
Kimberly Good, KCG Investment Advisory Services, Savannah, GA
Louis Green, PNC, Brooklyn, NY
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Christopher Hall, Charles Schwab, Highlands Ranch, CO
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Michael Kahn, Merrill Lynch, Weston, FL
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Cassie Kang, CK Wealth Mgmt. Group, Beverly Hills, CA
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Michael Krowe, Edelman Financial Engines, Reston, VA
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James Libutti, State Street Global Advisors, Andover, MA
Katherine Logsdon, Fifth Third Bank, Hilliard, OH
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Josh Mancell, Wealth Peak Financial Advisors, Minneapolis, MN
Michael Martin, Cornerstone Advisors, Bothell, WA
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Larry McCarty, Diversified Investment Services, Anaheim Hills, CA
Mark McConnell, Stand Together, Arlington, VA
Ryan McGuire, Wipfli Financial Advisors, Madison, WI
Nicole Mertzel, Merrill Lynch, Jersey City, NJ
James Neill, HighTower Bellevue, Bellevue, WA
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Terri Osness, Wells Fargo Advisors, Chandler, AZ
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Frank Pittman, SunTrust Private Wealth, Atlanta, GA
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Rebecca Proske, Charles Schwab, Freehold, NJ
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Homer Ramirez, JPMorgan, Rockwall, TX
David Roberts, Financial Strategies Group, Lansing, MI
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John Sullivan, Charles Schwab, Littleton, CO
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Brett Wallace, Morgan Stanley, Newtown Square, PA
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Cynthia Youngcourt, Affinity Wealth Mgmt., Wilmington, DE