# RECENT CIMA®, CPWA®, AND RMA® CERTIFICANTS

## The following individuals recently earned the CIMA® certification:

Matheus Ale, Merrill Lynch, Miami, FL
Arthur Awe, Cincinnati Asset Mgmt., Woodbridge, CT
Casey Benny, John Hancock Investments, Scottsdale, AZ
Stacy Bensimhon, Dynamic Funds, Montreal, QC, Canada
Chris Blair, AMP Capital, Sydney, New South Wales, Australia
Christopher Brademeyer, Northwestern Mutual, Troy, MI
Ed Brooks, Federated Hermes, Pittsburgh, PA
Austin Brown, Raymond James Financial, Clearwater, FL
Christopher Brown, Synovus Securities, Atlanta, GA
Michael Brozzo, Charles Schwab Investment Advisory, Oviedo, FL
Jason Bruns, T. Rowe Price, Baltimore, MD
Paul Bryer, Thrivent, Huntsville, AL
Scott Busch, Gettings Reed Financial, Lafayette, IN
Eilin Cabutto, PIMCO, Austin, TX
Robert Caine, Invesco, Atlanta, GA
Mark Calabrese, River Valley Wealth Mgmt., East Hartford, CT
Patrick Carney, Foresight Capital Mgmt. Advisors, Plymouth, MI
Michael Caterina, UBS Financial Services, New York, NY
Kenny Chang, Morgan Stanley, Upper Saddle River, NJ
Adam Chase, Charles Schwab, Boston, MA
Omar Chyou, MUFG Union Bank, Broomfield, CO
Michael Cila, GQG Partners, Fort Lauderdale, FL
Austin Clouse, Nationwide, Westerville, OH
Michael Coffey, Legg Mason, Wheaton, IL
Benjamin Colter, Janus Henderson Investors, Denver, CO
Brett Coneeny, Columbia Threadneedle Investments, South Boston, MA
Francisco Corona, Franklin Templeton Distributors, Sacramento, CA
Stephanie Crean, California Financial Partners, Claremont, CA
Brad Crow, Merrill Lynch, Evansville, IN
Ryan DeLissio, Alger, Wilton, CT
Sam Dittberner, Allianz Life Insurance Company, Minneapolis, MN
John Doran, J.P. Morgan Securities, New City, NY
Timothy Dunn, Merrill Lynch, Lexington, KY
Les Eisel, First State Trust Company, Wilmington, DE
Hesham El-Tarifi, Lonsec, Sydney, New South Wales, Australia
Paula Fedirchuk, Edward Jones, Seattle, WA
Jon Ferraiolo, Voya Investment Mgmt., Cumming, GA
Peter Finer, PGIM Investments, Martinsville, NJ
Anthony Fortunato, Advisors Asset Mgmt., Monument, CO
Zachary Gebben, Merrill Lynch, Zeeland, MI
Matthew Givens, Northwestern Mutual Wealth Mgmt. Co., Nashville, TN
Anthony Gomez, Merrill Lynch, Raleigh, NC
Barton Gunter, LPL Financial, Dallas, TX
Nicholas Hargreaves, Capital Group, San Antonio, TX
Michael Hart, Cohen & Steers, Long Island City, NY
Aaron Hayes, Sammons Retirement Solutions, Clive, IA
Christopher Heller, Morgan Stanley, Charleston, WV
Wendy Herchenroether, PNC Bank N.A., Sewickley, PA
Heather Howell, MacKay Shields, Mount Vernon, NY
Tanner Hoyt, Raymond James Financial Services, Greenville, NC
Armin Hrncic, Citizens Securities, Shelby Township, MI
Robert Joyce, Merrill Private Wealth, Boston, MA
Mindee Kissinger, Praxis Consulting, Sacramento, CA
Thomas Lambert, Morgan Stanley, Kahului, HI
Michael Lathrop, Newport Advisory, Franklin, TN
Alex Lohr, Transamerica, Denver, CO
Guillermo Lopez, Merrill Lynch, El Paso, TX
Jennifer MacMahan, Merrill Lynch, Louisville, CO
Wael Makarem, ICM.COM, Dubai, UAE
Matthew Marcantonio, Morgan Stanley Wealth Mgmt., Providence, RI
Nicholas Marchio, Merrill Lynch, Arlington, VA
Thomas Marik, Federated Hermes, Bellville, TX
Caleb Martin, GuideStone, Dallas, TX
Richard Martin, Capital Group, San Antonio, TX
Liam McCarthy, CIBC Wood Gundy, Montreal, QC, Canada
Craig McDonald, Janus Henderson, Sydney, New South Wales, Australia
Brent Mekosh, Raymond James Financial Services, Phoenix, AZ
Jason Method, Vanguard Group, Bordentown, NJ
Samuel Mirls, Channel Capital, Bondi Beach, New South Wales, Australia
Brett Mohler, Charles Schwab, Dublin, OH
Jared Moleski, Victory Capital Mgmt., Denver, CO
Pablo Montero Bianchi, Principal, Mullica Hill, NJ
Nelly Mounayar, Green Wealth Partners Ltd, Beirut, Lebanon
David Muscatello, Fidelity Investments, Chesterfield, MO
Edward Nassar, Janus Henderson Investors, Westlake, OH
Christopher Newton II, UBS Financial Services, Greenville, SC
James Noone, Vanguard Investments Australia, Kedron, Queensland, Australia
Shane O'Brien, Raymond James, Boca Raton, FL
Kevin O'Connor, Merrill, Delmar, NY
Jeffrey Olson, Capital Group, Fort Dodge, IA
Narayan Pallavur, Merrill Lynch, Agoura Hills, CA
Sarah Ponczek, UBS Private Wealth Mgmt., Boca Raton, FL
Matthew Ponder, Primerica, Shreveport, LA
Nicholas Reynolds, Washington Trust Bank, Spokane, WA
Malinda Rice, Franklin Templeton, Sacramento, CA
Paul Richards, Northwestern Mutual, Jacksonville, FL
John Robinson, Resolute Investment Managers, Keller, TX
Andrew Rogel, Westpac Wealth Partners, La Jolla, CA
John-Dylan Romann, INVESCO, Miami, FL
Julie Roth, Monterey Private Wealth, Monterey, CA
Robert Schaff, Uptown Partners, Charlotte, NC
Paula Schmitz, JP Morgan AM, Santiago, Chile
Gregory Smith, Capital Group, Carmel, IN
Regan Smith, Northwestern Mutual, Sandy Springs, GA
Brian Sullivan, Morgan Stanley, Boston, MA
Trent Thorbahn, Zacks Investment Mgmt., Chicago, IL
Lisa Thorpe, Wells Fargo Advisors, St. George, UT
Matthew Tomasino, First Eagle Investment Mgmt., El Segundo, CA
James Valenti, Ameriprise Financial, Agawam, MA
Vaidehi Vashi, Nikko Asset Mgmt., Sydney, New South Wales, Australia
Peter Vilim, Francis Financial, New York, NY
Jonathan Wakeman, Vanguard Investments Australia, Coogee, New South Wales, Australia
Haoyu Wang, First Trust, Stouffville, ON, Canada
Connor White, J.P. Morgan, New York, NY
Cole Williams, Cadent Capital, Dallas, TX
Reid Wilson, Morgan Stanley, New York, NY
Ryan Wilson, Carillon Tower Advisers, Tampa, FL
Derek Witte, Invesco, Boca Raton, FL
Corinna Wright, Capital Group, Carmel, IN
Anthony Wyzynajtys, Capital Group, Chesterfield, MI

## The following individuals recently earned the CPWA® certification:

John Agnew, The Wealth Collective, Los Angeles, CA
K. Amey, Financial Advisory Services, Leawood, KS
Brett Bacon, Lighthouse Financial Strategies, Lenexa, KS
Joshua Barbin, The Henry Group, Johnstown, PA
David Barse, Your Dedicated Fiduciary, Prosper, TX
Daniel Beckerman, Beckerman Institutional, West Long Branch, NJ
Andrew Beebe, Wells Fargo Advisors, Reno, NV
Daniel Beheshti, UBS Financial Services, Las Vegas, NV
David Beimesch, Fidelity Investments, Bixby, OK
Bert Bennett, RW Baird, Chapel Hill, NC
Nelly Berkovskaya, Morgan Stanley, San Francisco, CA
Tracy Bird, Morgan Stanley, Copake, NY
Sherry Birnbaum, Steward Partners, Teaneck, NJ
Christopher Blair, VSM Wealth Advisory, LLC, Cockeysville, MD
Andrew Block, City National Bank, Beverly Hills, CA
Colin Boddicker, Texas Capital Bank Private Wealth Advisors, Dallas, TX
Claire Brennan, Tortoise Investment Mgmt., White Plains, NY
Brendan Burke, Merrill Lynch, Heathrow, FL
Benjamin Campbell, Fidelity Investments, Westlake, OH
Nicholas Cavallaro, City National Rochdale, New York, NY
Andrea Cesare, Merrill Lynch, Atlanta, GA
Emily Chludzinski, Plante Moran Financial Advisors, Auburn Hills, MI
Brett Clark, Ameriprise Financial, Morgantown, WV
Kelley Coates-Carter, T. Rowe Price, Glen Burnie, MD
Rachael Crane, City National Rochdale, San Francisco, CA
Omar Cujar, LPL Financial, Boca Raton, FL
Bruce Davidson, Wells Fargo Advisors, Eagle, ID
Michael DeJong, Invesco, New Orleans, LA
Matt Dornik, Ameriprise Financial, Minnetonka, MN
Michael Drainville, Raymond James, Fenton, MI
Bryan Drowos, Wells Fargo Advisors, Boca Raton, FL
Carol Ejailat, Morgan Stanley, Houston, TX
Kristoffer Fu, Maven Bridge Capital, Rancho Mission Viejo, CA
Justin Gaudino, Mayflower Advisors, Tyngsboro, MA
Todd Godin, UBS Financial Services, Wilmington, NC
Ross Goldstein, Merrill Lynch Wealth Mgmt., Port Washington, NY
William Goodson, Wells Fargo Advisors, Winston Salem, NC
Peter Green, City National Rochdale Investment Mgmt., New York, NY
Michael Greer, Wells Fargo Advisors, Beverly Hills, CA
Paul Guerney, City National Rochdale, Chappaqua, NY
James Hammer, Lincoln Financial Advisors, Paramus, NJ
Meghan Harsevoort, Fifth Third Bank, Grand Rapids, MI
Christine Healy, Merrill Lynch, Iselin, NJ
Brett Hina, UBS Financial Services, Northfield, NJ
Michael Holland, RW Baird, Crestwood, KY
Sherry Holley, Gratz Park Private Wealth, Nicholasville, KY
Mitchell Hoover, Merrill Lynch, Denver, CO
Steven Houle, Fidelity Investments, Naples, FL
Grant Huttel, Wells Fargo Advisors, Duluth, MN
Juan Ibanez, City National Rochdale, Lake Mary, FL
Shaminderjit Kaur, Merrill Lynch, Short Hills, NJ
Asher Kennedy, Morgan Stanley, Brooklyn, NY
Richard Knight, Truist Investment Services, Melbourne, FL
R. Lamar, Wells Fargo Advisors, Meridian, MS
Laura Lee, Fifth Third Private Bank, Ada, MI
Bryce Leygraaf, Merrill Lynch, Vienna, VA
David Little, City National Rochdale, Royersford, PA
Brice Lowe, Stifel, Wichita, KS
Ronald Mabry, Merrill Lynch, Gilbert, AZ
Brian Mahoney, Morgan Stanley, Fort Lauderdale, FL
Gianna Marro, Merrill Lynch, New York, NY
Bradley Martin, Balentine, Atlanta, GA
Tyler Martin, Stonebridge Wealth Mgmt., Nashville, TN
Emily Mason, Morgan Stanley, Rogersville, AL
Shane Mason, Brooklyn FI, Brooklyn, NY
Daniel Matthews, RW Baird, Bloomington, IN
Jason Mayer, Wells Fargo Advisors, Charlotte, NC
Kevin McIntosh, City National Rochdale, New York, NY
Arun Murthy, TD Ameritrade Institutional, Flower Mound, TX
Poul Erik Olsen, City National Rochdale, Piedmont, CA
John Owens, Brooklyn FI, Brooklyn, NY
Derek Pease, RW Baird, Portland, OR
Christy Pedersen, Rockefeller Capital Mgmt., Oak Brook, IL
Robert Petrowski, Blackhorn Partners, Verona, WI
David Pezzillo, Merrill Lynch, Las Vegas, NV
Francis Phillips, Fisher Investments, Camas, WA
Nicholas Plate, Merrill Lynch, Northport, NY
Jeffrey Praino, Morgan Stanley, Victor, NY
Carlos Ramirez, Merrill Lynch, Indianapolis, IN
Christian Ray, QA Wealth Mgmt., Plymouth, MN
Tara Rich, Capital Group, Atlanta, GA
Cheryl Rigali, City National Bank, Pasadena, CA
Noah Robinson, Wells Fargo Advisors, Royal Oak, MI
Ryan Ross, Hummer Mower Associates, Chicago, IL
Steve Russell, Wells Fargo, Reno, NV
Marco Salerno, Morgan Stanley, San Francisco, CA
William Schoeffler, Wells Fargo Advisors, Atlanta, GA
Robert Shields, Merrill Lynch, Tampa, FL
Alexander Smith, UBS Financial Services, Long Island City, NY
Jonathan Smith, Wells Fargo Advisors, San Francisco, CA
Alexander Starnes, Bank of America Merrill Lynch, Raleigh, NC
Rebecca Stephens, RBC Wealth Mgmt., Seattle, WA
Mark Strubel, Federated Hermes, Dallas, TX
Wendy Szebelledy, Morgan Stanley, Los Angeles, CA
Seth Tracy, HFS, Omaha, NE
Craig Wall, Wells Fargo, Scottsdale, AZ
Matthew Watkins, ARGI Financial Group, Louisville, KY
Aaron Weser, Merrill Lynch, Tampa, FL
Jackson Williams, Merrill, Dallas, TX
Lemar Williams, Merrill Lynch, Lake Mary, FL
Bryan Wing, PAX Financial Group, San Antonio, TX
Brian Worley, The Martin Worley Group, Cottonwood Heights, UT

## The following individuals recently earned the RMA® certification:

Kimberly Bridges, BOK Financial, Mesa, AZ
Chi Hye Guerrero, HeimLantz, Gambrills, MD
William Hastie, Jr., Hastie Financial Group, Salinas, CA
Aaron Jackson, PFS Investments, Los Angeles, CA
Gary Jeweler, Evolve Financial, Seattle, WA
Maribel Maldonado, Merrill Lynch, Miami, FL
Christine Pavel, Keating & Associates, Wheaton, IL