RECENT CIMA®, CPWA®, AND RMA® CERTIFICANTS

The following individuals recently earned the CIMA® certification:

James Austin, Advisors Asset Mgmt., Boerne, TX
Joseph Baker, Invesco, Richmond, VA
Jonathan Bernardo, AMG Funds, Stamford, CT
Aixa Betancourt, Merrill Lynch, Chatham, NJ
Sean Bieker, Veritas Wealth Advisors, Reno, NV
Edward Bronkhorst, USI Advisors, Friendsville, TN
Justin Brown, BOK Financial, Prosper, TX
Justin Bunkers, McGill Junge Wealth Mgmt., Clive, IA
Damien Casey, Lonsec, Sydney, Australia
Madeline Christman, Fifth Third Bank, Chicago, IL
Jennifer Chung, BDF, Itasca, IL
Brandon Coxen, Dimensional Fund Advisors, Belmont, NC
Geoff DeMarco, DSL Financial Services, Poughkeepsie, NY
Adam Dorfman, Wells Fargo Advisors Financial Network, Denville, NJ
Robert Duncan, The Baptist Foundation of California, Ontario, CA
Richard Eddy, CONA Wealth, Pasadena, CA
Matthew Edwards, Ameriprise Bank, Lakeville, MN
Bryan Faller, The Faller Company, Turnersville, NJ
Patrick Ford, BWM Financial, La Jolla, CA
Benjamin Fredrickson, Edward Jones, Houston, TX
Marguerite Gallagher, Gallagher Wealth Mgmt., Albuquerque, NM
Ryan Gerth, Thrivent Financial, Waunakee, WI
Andrew Gilmartin, Lebenthal Global Advisors, Glen Cove, NY
Thomas Glynn, DNR Capital, Fairlight, New South Wales, Australia
Gregory Goff, Prudential, Charlotte, NC
Ana Gonzalez, NewEdge Wealth, Coral Gables, FL
Rodrigo Gonzalez, Federal Reserve Bank of New York, Chicago, IL
Roger Graham, Wells Fargo, San Antonio, TX
Brian Harriman, Charles Schwab, Parker, CO
Kelly Hauser, RoseStone Wealth Advisors, Shreveport, LA
Adam Herdel, Vanguard Investments Australia, Yarraville, Victoria, Australia
Scott Hoff, First Heartland Capital, Lake St. Louis, MO
Daniel Jones, JPMorgan Asset Mgmt., Chicago, IL
Allison Kletschke, Avalon Capital Group, Dakota Dunes, SD
Edward Koncel, Advisors Asset Mgmt., Plainfield, IL
Victor Kopen, Franklin Templeton, Beaver Falls, PA
John Krasniqi, Franklin Templeton, Carmel, NY
Zachary Larkin, Northwestern Mutual Investment Services, Louisville, KY
David Leone, Pacific Select Distributors, Leesburg, VA
Jayden Liu, Bank of America, Vienna, VA
Félix López Santiago, Popular Securities, San Juan, PR
Carl Lymangood, Wells Fargo, Minnetonka, MN
Tyler Mabry, BlackRock, Boston, MA
Kristan Martin, Capital Group, San Antonio, TX
Jesus Martinez, Capital International Mgmt. Co., Madrid, Spain
Carson McGill, McGill Junge Wealth Mgmt., Clive, IA
Ryan McLean, Cohen & Steers, Los Angeles, CA
Isabella Milazzo, Funds SA, Adelaide, South Australia, Australia
Bradley Miller, Merrill Lynch, Easton, MD
Joel Moore, Bank of America Merrill Lynch, Chicago, IL
John Morcos, Merrill Lynch, New York, NY
Joel Morgan, Edward Jones, Fort Worth, TX
Angela Morrow, BPAS, Doylestown, PA
Christopher Mottershead, Bank of America Private Bank, West Windsor, NJ
Brandon Myers, Invesco, Kennesaw, GA
Kelly Napier, AMP Capital, Yarraville, Victoria
Michael Ngo, Capital Group/American Funds, Fishers, IN
Kyle Nickerson, Rhame & Gorrell Wealth Mgmt., Spring, TX
Judson Nierman, Merrill Lynch, Arlington Heights, IL
Gabrielle O'Leary, UBS Financial Services, New York, NY
Seth Panucci, Merrill Lynch, Mystic, CT
Ryan Peterson, UBS Financial Services, Encinitas, CA
Colt Pierotti, UBS Financial Services, Collierville, TN
Bradley Poertner, AssetMark, Chicago, IL
Christopher Proctor, Legacy Financial Strategies, Leawood, KS
Douglas Pryor, Wedbush Securities, Rancho Palos Verdes, CA
Muhammad Qureshi, UBS Financial Services, Birmingham, MI
Sean Reilly, Morgan Stanley, Providence, RI
Abimelek Rodriguez, Morgan Stanley, Bridgeport, CT
John Sabol, Symetra, Grosse Pointe Park, MI
Samuel Scott, Baird, Davidson, NC
Jacob Statz, Merrill Lynch, Indianapolis, IN
Phillip Stedman, Merrill Lynch, Austin, TX
Jerry Sunde, Thrivent, Brooklyn Park, MN
Jerathen Tillman, 4Point Wealth Mgmt. Wells Fargo Financial Network, Cornelius, NC
Edward Trevino, Capital Group, Boerne, TX
Tye Uppinghouse, Catalyst Funds, Fishers, IN
Samuel Urso, Bleakley Financial Group, Centennial, CO
Brandon Walters, Edward Jones Investments, Buffalo, MN
Dustin Watts, Team Wealth & Tax Advisors, Temecula, CA
Marius Wentzel, AMP Capital, Collaroy Plateau, New South Wales, Australia
Brandon Wheeler, Vanguard, Phoenix, AZ
Troy Yenser, Raymond James, Mechanicsville, VA
Bennett Zaba, Vanguard, Yardley, PA
Jianjun Zheng, Truist Investment Services, Nashville, TN

The following individuals recently earned the CPWA® certification:

Katherine Bachmann, UBS Financial Services, Atlanta, GA
Stephen Benotti, Wells Fargo Advisors, Tomball, TX
Erin Bethge, Raymond James, Poway, CA
David Burchfield, Baird, Denver, CO
Christian Burns, Southwest Wealth Advisory Group, Phoenix, AZ
Hannah Buschbom, Ameriflex Financial Services, Santa Barbara, CA
Kurt Campman, Wells Fargo Advisors, Irvine, CA
Nalini Dhar, Merrill Lynch, New York, NY
Cameron Diehl, Raymond James, Tampa, FL
Craig Dods, Granite Wealth Mgmt., Richmond, VA
Eric Ethington, Wells Fargo, Piedmont, CA
Patrick Foley, Edward Jones, New London, NC
Will Ford, Capital Group Companies, Brooklyn, NY
Patrick Gorgonzola, The Fairman Group, Chesterbrook, PA
Matthew Graves, Harrison Financial Services, Omaha, NE
Wanda Gray, TD Ameritrade, Mesquite, TX
Rosemarie Halajian, Fidelity Investments, Larkspur, CA
Matthew Harring, Raymond James, St. Petersburg, FL
Thomas Heilman, Merrill Lynch, Fargo, ND
James Hofman, Wells Fargo Advisors, Chesterfield, MO
Robert Hofman, Wells Fargo Advisors, Chesterfield, MO
Savannah Holley, Gratz Park Private Wealth, Lexington, KY
Ying Hu, Citigroup, Stamford, CT
Robert Hudnall, Ashford Advisors, Shreveport, LA
Jacqueline Hunt, R. W. Baird, Bowling Green, KY
Jonathan Isaacman, Fidelity, Los Angeles, CA
Kyle Jacobsmeyer, Renaissance Financial Corp., St. Louis, MO
Zachary Jamieson, Edward Jones, Medford, OR
Alex Jensen, U.S. Bank, Cedar Rapids, IA
David Jester, Baird, Chapel Hill, NC
Kevin Johns, Fifth Third Bank, Atlanta, GA
Zachary Johnston, UBS Financial Services, Minneapolis, MN
Katheryn Jones, Merrill Lynch, Stamford, CT
Eileen Kane, Capital Group, Atlanta, GA
Keith Kitagawa, Merrill Lynch Wealth Mgmt., San Diego, CA
Nathan Krampe, Lion's Wealth Mgmt., St Louis Park, MN
Bradley Larson, Bailard, Burlingame, CA
Michael Lawrence, Heritage Family Offices, San Diego, CA
Christopher Lee, New England Capital Financial Advisors, Meriden, CT
Andrew Lisi, The Next Level Planning Group, Chicago, IL
Raquel Lopez, CAPTRUST, San Antonio, TX
Adam Mace, JP Morgan, Merion Station, PA
Celia Martel, Charles Schwab, San Antonio, TX
Barry McCall, McCall and Associates–Raymond James Financial Services, Brentwood, TN
Leon Medved, Leumi Investment Services, Northridge, CA
Andrew Meredith, Tyton Capital Advisors, Minato, Tokyo, Japan
Michael Micallef, Charles Schwab, Windermere, FL
Aaron Nance, Edward Jones, Chandler, AZ
Sarah Neff, Robert W. Baird, Winston-Salem, NC
Jeremy Newton, Merrill Lynch, Houston, TX
Jordan Nightingale, MAI Capital Mgmt., Ponte Vedra Beach, FL
William Norwood, J.P. Morgan Securities, Glencoe, IL
Ghazi Nweiran, Fidelity Investments, Jersey City, NJ
April Perez, City National Rochdale, Spring, TX
Shaun Peterson, Peterson Wealth Services, South Ogden, UT
Scott Piggush, SA Piggush Financial Consultants, Manteno, IL
Jesus Pinedo, Marketwise Private Asset Mgmt., St. Petersburg, FL
Scott Pollaci, City National Rochdale, Windermere, FL
Evan Potash, TIAA, Holland, PA
Sarah Power, Robert W. Baird, Seattle, WA
Judson Redmond, RBC Global Asset Mgmt., Dallas, TX
Benjamin Remer, Charles Schwab, Highlands Ranch, CO
Ryan Salah, Capital Financial Benefit Solutions, Towson, MD
Christopher Scoletti, Morgan Stanley, Monroeville, PA
Denny Sechrest, Merrill Lynch, Walnut Creek, CA
Douglas Semple, First Citizens Bank, Apex, NC
Dylan Seubert, NorthRock Partners, Appleton, WI
Dennis Singh, Merrill Lynch, Great Neck, NY
Michael Taila, City National Rochdale, Los Angeles, CA
Rafael Urena, Raymond James Financial, Tampa, FL
Tyler Van Donge, Charles Schwab & Co., Orlando, FL
Nicholas Vantrease, Provident Wealth, Knoxville, TN
Marisa Walker, R.W. Baird, Walla Walla, WA
M. Warner, Warner, Hood and Hardee of Wells Fargo Advisors, Kinston, NC
Georg Wells, Merrill Lynch, White Plains, NY
Cody Williams, Edward Jones, Canton, GA
James Woodruff III, Raymond James, Birmingham, AL
Donald Zabudsky, Morgan Stanley, Lake Oswego, OR

The following individuals recently earned the RMA® certification:

William Blick, Merrill Lynch, Pleasanton, CA
Paul Brown, Clearstone Wealth Mgmt., Liberty Lake, WA
Letian Dong, Tom Morris-Northwestern Mutual, Coram, NY
Jordan Green, Trankler Wealth Mgmt., Fenton, MO
Timothy Haas, The Haas Agency, Sandy Hook, CT
Hayden Hill, BentOak Capital, Weatherford, TX
Andrew Johnson, Northwestern Mutual, Durham, NC
Beau Kemp, Sensible Money, Scottsdale, AZ
Bradley Morris, The Advanced Financial Group, Lufkin, TX
Cassidy Murphy, FinTrust Capital Partners, Greer, SC
Lauren Poleto, Wells Fargo, Fort Mill, SC
Darrell Pounders, Capital Group/American Funds, Midway, UT
Lisa Shelton, Morgan Stanley, Brush Prairie, WA
Zechariah Shown, Core Planning, Eldon, MO
Paul Wenstrom, Merrill Lynch, Grand Blanc, MI
Edward Yetsko, Aspire Financial Group, Vestal, NY