CPWA® CERTIFIED PRIVATE WEALTH ADVISOR®

THE PREMIERE CERTIFICATION FOR **PRIVATE WEALTH ADVISORS**

WHAT IS THE CPWA CERTIFICATION?

Certified Private Wealth Advisor® (CPWA®) is an advanced education and certification program for financial advisors who work with high-net-worth clients on the life-cycle of wealth: accumulation, preservation, and distribution.

The holistic, multidisciplinary CPWA program requires advisors to meet rigorous standards:

- Experience: At least five years of relevant financial services experience and a clean regulatory record
- Ethics: Comply with the *Institute Code of Professional Responsibility* or lose the certification
- Education: Complete executive education at a top 25 global business school
- Exam: Pass a stringent five–hour examination
- Continuing Competency: Stay updated on industry trends, laws, and products with 40 hours of continuing education every two years, including two hours of ethics education

Clients want to know that their advisors are going above and beyond the minimum requirements to sharpen their technical skills. 77% of CPWA advisors hold more than two designations*

Source: Building High-Net-Worth Knowledge through the CPWA Certification, AITE, 2017

Knowledge Domains

Human Dynamics:
Ethics
Applied behavioral finance
Family dynamics

Wealth Management Strategies
Tax strategies and planning
Portfolio management
Risk management and asset management

Client Specialization and Client Focus:
Closely held business owners
Executives
Retirement

Legacy Planning:
Charitable giving
Estate planning and wealth transfer

INVESTMENTS & WEALTH INSTITUTE™
formerly IMCA