RECENT CIMA®, CPWA®, AND RMA® CERTIFICANTS

The following individuals recently earned the CIMA® certification:

Jacob Allen, Merrill Lynch, Kirkwood, MO
Andrew Axelson, JP Morgan Chase, San Diego, CA
Philip Bachman III, BCS Wealth Mgmt., Johnson City, TN
Alena Baranova, T. Rowe Price, Baltimore, MD
Maxwell Barnett, Invesco, Chicago, IL
Christopher Bertorelli, John Hancock Investment Mgmt. Distributors, Coronado, CA
Ian Boater, Vanguard, Brisbane, Queensland, Australia
Alexandra Boon, Morgan Stanley, Louisville, KY
Robert Brown, BB&T Scott & Stringfellow, Fort Worth, TX
Robert Carollo, Franklin Templeton, St. Petersburg, FL
Tyrone Chow, Walnut Creek Wealth, Walnut Creek, CA
Bob Colville, JP Morgan, La Grange, IL
Jeffrey Crowell, Merrill Lynch, Marietta, GA
Charles Curtis, Fulfillment Wealth Mgmt., Littleton, CO
Deepak Danavar, UBS Financial Services, Tarzana, CA
David Dankmyer, Federated Investors, Franklin, TN
Robert Dwyer, Merrill Lynch, Punta Gorda, FL
Joshua Fiedler, Merrill Lynch, San Francisco, CA
Brittany Flynn, Victory Capital, Lakewood, OH
Patrick Forbringer, Janus Henderson Investors, Denver, CO
Lee Forehand, Morgan Stanley, Dothan, AL
Rommel Garcia, Merrill Lynch, Gainesville, FL
Michael Giacone, UBS Financial Services, New York, NY
Deirdre Gibson, Eventide Asset Mgmt., Lone Tree, CO
Ciara Hanratty, Wealth Plan Advisor, Scottsdale, AZ
Micah Hart, SunTrust Investment Services, Clarksville, MD
Tyler Hengstebeck, Franklin Templeton, St. Petersburg, FL
Lauren Higgins, O'Brien Wealth Partners, Hingham, MA
Daniel Jeffers, Merrill Lynch, New York, NY
Tyler Jenkins, Invesco, Pasadena, TX
Raider Keenan, Integrity Wealth Advisors, Colorado Springs, CO
Garrett Kelley, Victory Capital Mgmt., Manhattan Beach, CA
Justin Knowles, Columbia Threadneedle Investments, Chicago, IL
Morgan Koehler, Invesco, Hoboken, NJ
Perry Korszen, Raymond James, Venice, FL
Charles Kruger, Baron Capital, Austin, TX
Trey Lawson, Merrill Lynch, Tyler, TX
Nicholas Lico, Merrill Lynch, Washington, DC
Michael Mazzeo, Morgan Stanley, Cortlandt Manor, NY
Owen McCabe, Wells Fargo Advisors Financial Network, Plano, TX
Jason Muntner, Victory Capital Mgmt., Miami, FL
Jarrett Naiden, Glenmede Investment Mgmt., Philadelphia, PA
James Naldi, Allianz Global Investors, Cardiff by the Sea, CA
Mario Pandolfo III, Invesco, Prairie Village, KS
Brian Parese, Natixis Investment Managers, Boston, MA
Anthony Picerni, Capital Group, Westfield, IN
Sam Reese, Edward Jones, Greenville, SC
Christopher Richardson, Capital Group, Atlanta, GA
Zachary Saksa, Bank of America Merrill Lynch, Pennington, NJ
William Schwartz, DWS, Tower Lakes, IL
Natalie Schweers, Synovus Securities, Augusta, GA
David Sleeper, Epoch Investment Partners, New York, NY
Thomas Smith, Merrill Lynch, Fairhope, AL
Leif Springer, UBS Financial Services, Washington, DC
Corey Suchocki, Putnam Investments, Detroit, MI
Kyle Traeger, Franklin Templeton, Pinellas Park, FL
Adam Trimboli, Vanguard Australia, Richmond, Victoria
Mark VanderMeer, LVZ Advisors, Holland, MI
James Williams, Stifel, Mobile, AL
Benjamin Wooden, Capital Group, Carmel, IN
Jose Zambrano, Franklin Templeton, Doral, FL
Kevin Zhang, First Eagle Investment Mgmt., Morganville, NJ

The following individuals recently earned the CPWA® certification:

Chuck Alberton, City National Rochdale, San Anselmo, CA
Greg Ashcroft, Baird, Houston, TX
Samuel Baldwin, Spencer Financial, Sudbury, MA
John Barret, Merrill Lynch, Ft. Worth, TX
Peter Boland, Wells Fargo Advisors, Cincinnati, OH
Salim Boutagy, Congress Wealth Mgmt., Trumbull, CT
Robert Buchanan, Jr., UBS Financial Services, Austin, TX
Michael Carle, Fidelity Investments, Cincinnati, OH
Christopher Collier, Fidelity Investments, Tigard, OR
Robert Cook, Fifth Third, Hermitage, TN
Garrett D'Alessandro, City National Rochdale, New York, NY
Martim De Arantes Oliveira, Cresset Family Office, San Mateo, CA
Max Dean, Raymond James, Atlanta, GA
Joe DePaula, UBS Financial Services, Houston, TX
Ryan Goode, BMO Private Bank, Indianapolis, IN
Hope Hanrahan, Merrill Lynch, Boulder, CO
Kenneth Hoover, Morgan Stanley, Houston, TX
Elizabeth Jacovino, RBC Wealth Mgmt., Woodbridge, CT
Robert Joyce, Merrill Private Wealth, Boston, MA
Joshua Kaplan, Landmark Wealth Mgmt., Amherst, NY
Thomas Kavanagh, Lenox Wealth Advisors, Sunnyside, NY
Jin Kim, Charles Schwab, Denver, CO
Michael Lancaster, Merrill Lynch, Westborough, MA
Lance Lehman, Fisher Investments, Vancouver, WA
Marshall Lund, Wipfli Financial Advisors, Chicago, IL
Brian Matter, CCMI, San Diego, CA
Ashley May, Merrill Lynch, Locust Valley, NY
Susan McBee, Edward Jones, Scottsdale, AZ
John McNamara, Dimensional Fund Advisors, Agoura Hills, CA
Alden Mergenthal, Elwood and Goetz Wealth Advisory Group, Athens, GA
John Molster, BBT Scott & Stringfellow, Richmond, VA
Randel Morris, Fidelity Investments, Pittsburgh, PA
Rebecca Neils, Charles Schwab, Lone Tree, CO
Junko Nishida, Cottonwood Mgmt., Reno, NV
David Pickler, Pickler Wealth Advisors, Collierville, TN
Eric Ring, Janus Henderson Investors, Andover, MA
Joshua Schultz, City National Rochdale, Chicago, IL
Tim Sheehan, Wells Fargo, Chicago, IL
Mitchell Strickling, Dalebert Properties, Austin, TX
Marcellus Upshaw, Bank of America Private Bank, Houston, TX
Tate Williamson, Merrill Lynch, Bakersfield, CA
Marc Wong, UBS Financial Services, Melville, NY

The following individuals recently earned the RMA® certification:

Luis Alayo-Riera, The Atlas Financial Group, Miami Beach, FL
Michael Baker, Vertex Capital Advisors, Fort Mill, SC
Edward Barno, Rockbridge Investment Mgmt., Syracuse, NY
Gregory Benner, LPL Financial, Downers Grove, IL
Thomas Bidwell, Morgan Stanley, Dayton, OH
Erin Cominole, Merrill Lynch Wealth Mgmt., Troy, NY
Howard Eisenberg, WealthTec, Fulton, MD
Michael Henley, Brandywine Oak Private Wealth, Kennett Square, PA
Brian Johnson, Eaton Vance, Edina, MN
Edmond Lok, Deutsche Bank Wealth Mgmt., Moraga, CA
Mark Lumia, True Wealth Group, Oxford, FL
Michael Meridith, Perk Planning, Madison, WI
Thomas Morrow, Merrill Lynch, Reston, VA
Andrea Neville, American Funds by Capital Group, Los Angeles, CA
Milton Nuckols, Wells Fargo Advisors, St. Augustine, FL
Ryan Thomsen, First Oak Wealth Mgmt., Raleigh, NC
Roger Whitney, Agile Retirement Mgmt., Fort Worth, TX

EDUCATIONAL PROGRAMS

For CIMA®, CPWA®, and RMA® class schedules and enrollment information, visit www.investmentsandwealth.org/getcertified.