

RECENT CIMA® AND CPWA® CERTIFICANTS

The following individuals recently earned the CIMA® certification:

Daniel Alonso, Morgan Stanley, Miami, FL
 Stephen Anthony, Industry Super Australia, Melbourne, Australia
 John Armstrong, T. Rowe Price, Owings Mills, MD
 Colin Babb, Merrill Lynch, Brea, CA
 William Bain, Heritage Financial Services, Westwood, MA
 Tarik Bakir, TNT Asset Mgmt., Round Rock, TX
 Christopher Bardwell, Raymond James & Associates, Port Washington, NY
 Myles Baron-Hay, Baron-Hay Investments Pty Ltd, Northbridge, New South Wales, Australia
 Mandy Baune, Northwestern Mutual, Mendota Heights, MN
 Allison Beckham, Firestone Capital Mgmt., Miami, FL
 Kize Behrends, Global X ETFs, Western Springs, IL
 Derek Binstock, American Trust Center, Bismarck, ND
 Dial Boehmer, Merrill Lynch, Cambridge, MA
 Eric Brown, Vanguard, West Chester, PA
 Andrew Burns, Merrill Lynch, Marshfield, MA
 Michael Carrig, Merrill Lynch, Orchard Park, NY
 Jason Chao, Morgan Stanley, Colorado Springs, CO
 Carolina Chatila, Morgan Stanley, Brooklyn, NY
 Robert Cramer, Merrill Lynch, Atlanta, GA
 Denis Cronin, Merrill Lynch, Ormond Beach, FL
 Robert Daniels, Sammons Retirement Solutions, Clive, IA
 Jon Davies, John Hancock Investment Mgmt., Queen Creek, AZ
 Eric Davis, Integrity Wealth Advisors, Colorado Springs, CO
 Zachary DeVincenzo, Vanguard Group, King of Prussia, PA
 Rosemarie Dios, UBS Financial Services, Southampton, NY
 Daniel Doyle, Oak Park Wealth Mgmt., Lakewood, OH
 David Dryer, PIMCO, Justin, CA
 Edward Fazzah, Merrill Lynch, Miami, FL
 Alexander Flecker, HRC Financial Group, New York, NY
 Bradley Frailey, The Baptist Foundation of California, Ontario, CA
 Andrew Froelich, Macco Financial Group, Inc., Green Bay, WI
 Tomas Geoghegan, Beacon Hill Private Wealth, Summit, NJ
 Mark Giordano, Morgan Stanley, Luckahoe, NY
 Simon Glazier, Fidelity International, Kirrawee, New South Wales, Australia
 Catherine Haldeman, Primerica, Omaha, NE
 Kelly Hammond, Waddell & Reed, Leawood, KS
 Juan Hanuszkiewicz, Equitable Advisors, Miami, FL
 LeaAnna Hartman, Invesco Inc., Atlanta, GA
 Sarah Hartzke, AllianceBernstein, St. Louis, MO
 Connor Hawkinson, Global X Mgmt., New York, NY
 Alyssa Hirst, Hartford Funds, Wayne, PA
 Mary Hiss, Orgel Wealth Mgmt., Altoona, WI
 Matt Hoenes, Professional Wealth Advisors, Downers Grove, IL
 Anthony Horan, UBS Financial Services, Short Hills, NJ
 Jon Hsu, Griffin Black, Redwood City, CA
 I-Hsin Huang, Franklin Templeton Investments, Sydney, Australia
 Linh Huynh, Colonial First State, Sydney, Australia
 Jonathan Iula, Merrill Lynch, Sagamore Hills, OH
 Aaron Jackson, PFS Investments, Los Angeles, CA
 Joseph Jeeves, Raymond James, Marquette, MI
 Charles Jonas, Invesco, Long Beach, NY
 Ross Kamovitch, American Century Investments, New York, NY
 Marc-Antoine Kingue Elessa, Capital Group, Montreal, QC, Canada
 Jared Klappman, Beaumont Capital Mgmt., Abington, MA
 Ryan Kleiss, Edward Jones, Arthur, IL
 Scott Koehler, Morgan Stanley, Haddonfield, NJ
 Frank Kugler, Hartford Funds, Wayne, PA
 Kevin Kulak, Brinker Capital, Ambler, PA
 Mitch Lawson, Touchstone Investments, Cincinnati, OH
 Bryce Leyden, Vanguard Investments Australia, Melbourne, Australia
 Justin Lloyd, Merrill Lynch, Pittsburgh, PA
 Daniel Lohman, Avantis Investors, Kansas City, MO
 Ryan Luna, The Rice Partnership, Irvine, CA
 Michael Malave, Morgan Stanley Investment Mgmt., Wading River, NY
 Tamzin Manning, Epoch Investment Partners, Rye, NY
 Delon Mansour, LPL Financial, El Cajon, CA
 Michael Marano, Hartford Funds, Allentown, PA
 Christopher Marchand, Raymond James, Clinton Township, MI
 Bryan Martinez, PGIM Investments, Brooklyn, NY
 Kevin McAloon, Wells Fargo, Summit, NJ
 Justin Medrano, Merrill Lynch, Santa Fe, NM
 Renat Memedovski, First Trust L.P., London, ON, Canada
 Sarah Montoya, Morgan Stanley, Carlsbad, CA
 Tyler Morris, Brown Wealth Mgmt., Carlsbad, CA
 Bob Morton, Berman Capital Advisors, Atlanta, GA
 Patrick Mullin, Merrill Lynch, Boston, MA
 Ryan Mumroe, Reilly Financial Advisors, San Diego, CA
 Andrew Murano, Lazard Asset Mgmt., Douglaston, NY
 Eric Norman, Investors Financial Group, Minneapolis, MN
 Ghazi Nweiran, J.P. Morgan Securities, Hoboken, NJ
 Michael Obradovits, Merrill Lynch, St. Louis, MO

Patrick O'Reilly, Federated Hermes, Sarver, PA
 Mark Orvin, LPL Financial, Charlestown, MA
 Anthony Owen, SunTrust Investment Services, Atlanta, GA
 Spencer Page, Invesco, St. Louis, MO
 Spencer Phillips, Ivy Investments, Overland Park, KS
 Thomas Piazza, AssetMark, Libertyville, IL
 Timothy Pierce, Natixis Investment Managers, Mequon, WI
 Michael Pucci, Advisors Asset Mgmt., West Hempstead, NY
 Shabeen Rehman, J.P. Morgan, New York, NY
 Melissa Reis, Ameriprise Financial, San Marcos, CA
 Gary Rialti, Waddell & Reed, Olathe, KS
 Michael Roberts, Lazard Asset Mgmt., Monmouth Beach, NJ
 James Roland III, Regions Investment Solutions, Madison, MS
 Lance Rummel, Morgan Stanley, Seattle, WA
 Curtis Sahler, Morgan Stanley, Battle Ground, WA
 Juan Pablo Sanz Rojas, Merrill Lynch, Long Island City, NY
 Bryan Saylor, High Point Financial/Commonwealth Financial Network, King of Prussia, PA
 Brendan Schutt, Federated Hermes, Pittsburgh, PA
 Jackson Scott, Colonial First State, Roseville Chase, New South Wales, Australia
 Daniel Sheehan, Lazard Asset Mgmt., Sydney, Australia
 Scott Shook, Trust Investment Services, Greenville, NC
 Dean Shore, Shore Wealth Mgmt., Danville, IL
 Anthony Simon, Merrill Lynch, Grosse Pointe Shores, MI
 Jason Smilowitz, Alger, New York, NY
 Lachlan St. Clair, Chick St. Clair and Partners, North Sydney, Australia
 Andrew St. Jean, ArkWise Financial, Charlottesville, VA
 Justin Sultana, First Sentier Investors, Barangaroo, New South Wales, Australia
 Alec Swofford, Advisors Asset Mgmt., Boerne, TX
 Jared Szychter, 1932 Capital Mgmt., Inc., Villanova, PA
 Liam Timmons, Timmons Wealth Mgmt., Attleboro, MA
 Mark Tishman, Amundi Pioneer Asset Mgmt., Overland Park, KS
 Andrew Turcotte, Principal Funds Distributor, West Des Moines, IA
 Patrick Vande Bossche, Northwestern Mutual, Yorba Linda, CA
 Tyler VanGilder, PPM America, Chicago, IL
 Patrick Verdon, John Hancock Investment Mgmt., Phoenix, AZ
 Benjamin Waddicor, J.M. Forbes & Co., Boston, MA
 Zakariya Wahdan, Absher Wealth, Chapel Hill, NC
 Leo Walker, Wells Fargo Advisors, Carlsbad, CA
 Champ Warren, Merrill Private Wealth Mgmt., Houston, TX
 Rachel Werdann, J.P. Morgan, Jupiter, FL
 Nick Werthman, Advisors Asset Mgmt., East Lansing, MI
 Geoffrey Wilson, BNY Mellon Investment Mgmt., Brentwood, TN
 Scott Windsor, Citizens First Wealth Advisors (Infinex Financial Group), The Villages, FL
 Matthew Wiseaupt, Wiseaupt Bray Asset Mgmt., Palm Beach Gardens, FL
 Charles Wood, Brightworth, Atlanta, GA
 Joseph Yapaola, Ameriprise Financial, Los Gatos, CA
 William Zolga, WisdomTree Investments, Bristol, RI

The following individuals recently earned the CPWA® certification:

Michael Absher, Absher Wealth Mgmt., Chapel Hill, NC
 Roman Alpert, City National Bank, New Jersey, NJ
 Ann Alsina, CovingtonAlsina, Annapolis, MD
 Caitlyn Ambrosi, Eaton Vance WaterOak Advisors, Somerville, MA
 Brian Anderson, Fifth Third Private Bank, Dayton, OH
 Ethan Anderson, Veritas Financial Strategies, Edina, MN
 Christopher Barnes, Plante Moran Financial Advisors, Detroit, MI
 Christopher Barnes, Fidelity Investments, Commack, NY
 Joseph Bartell, UBS Financial Services, Birmingham, MI
 Duane Bazis, Bazis Young Investment Group, Omaha, NE
 Gary Bergeron, Morgan Stanley, Portland, ME
 Lock Bingham, Stifel, San Francisco, CA
 Maya Bittar, Madison Investment Advisors, Madison, WI
 Emily Boothroyd, Price Financial Group, Wilton, CT
 Sheldon Brandau, City National Rochdale, Longwood, FL
 Palina Calihan, Fidelity Investments, Wellington, FL
 Joseph Chesney, Merrill Lynch Wealth Mgmt., Denver, CO
 Daniel Chiavari, Wells Fargo Advisors, Orlando, FL
 Heather Churchill, Morgan Stanley, Orlando, FL
 Angelo Ciaglia, Oppenheimer Funds, Marlboro, NJ
 Benjamin Cox, Fifth Third Private Bank, Indianapolis, IN
 Vicki Crisalti, Tortoise Investment Mgmt., Chappaqua, NY
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 Michael D'Aquila, Northwestern Mutual/Heritage Planning Partners, Chicago, IL
 Jennifer Desmond, Fifth Third Bank, Jacksonville, FL
 Melissa Devolve, Merrill Lynch, Colorado Springs, CO
 Elizabeth Dooley, City National Rochdale, New York, NY
 John Dreshaj, Plante Moran, Detroit, MI
 Philip D'Unger, CAPTRUST, Raleigh, NC
 Jacob Echols, Edward Jones, Yuma, AZ
 Wendy Eddy, The Eddy Investment Group, Torrance, CA
 Dustin Eldridge, Tolleson Wealth Mgmt., Dallas, TX
 Adrian Engel, City National Rochdale, Los Angeles, CA
 Matthew Ervin, Kennedy Financial Services, Eastland, TX
 Taharka Farrell, Bank of America Private Bank, Bronx, NY
 Caitlin Fastiggi, HFO Services, Perrineville, NJ
 Robert Foltz, Charles Schwab, Lone Tree, CO
 Lauren Ford, Merrill Lynch, Fort Worth, TX
 Kevin Freihofer, Wells Fargo Advisors, Bend, OR
 Daniel Gallagher, Fidelity Investments, Highlands Ranch, CO
 Victor Galvez, Bank of America Merrill Lynch, Chula Vista, CA
 Kyle Grossmeyer, City National Bank, Burbank, CA
 Nicholas Grubb, Morgan Stanley, Bethesda, MD
 Amelia Guidi, Morgan Stanley, Boulder, CO
 Sergio Guzman, Vanguard, Exton, PA
 Frederick Haas, Merrill Lynch, Greensburg, PA
 Mikal Haddad, J.P. Morgan Securities, Brooklyn, NY
 Neil Holmes, Rockefeller Capital Mgmt., Atlanta, GA
 Chad Home, Wells Fargo, Salt Lake City, UT
 Jason Howell, Jason Howell Company, Vienna, VA
 Lily Huang, HSBC Private Bank USA, San Francisco, CA
 Susan Kang, RF Investment Mgmt. Company, New York, NY
 Patrick Kelly, Altair Advisors, Chicago, IL
 Laura Kling Baffico, Thornburg Investment Mgmt., Montclair, NJ
 Charles Koch, Invesco, Greenwood Village, CO
 Michael Kortfelt, Charles Schwab, Noblesville, IN
 Gage Krieger, Ivy Investments/Waddell & Reed, Overland Park, KS
 John Ledford, Merrill Lynch, Dallas, TX
 Emily Lee, Carson Wealth, Bristol, VA
 Max Lee, UBS Financial Services, Irvine, CA
 Robert Linskey, Putnam Investments, Charlestown, MA
 James Lipari, UBS Financial Services, Kansas City, MO
 Kenneth Lopian, Bank of America/Merrill, Chatham, NJ
 Christopher MacLellan, Northern Trust, Odessa, FL
 Robert Main, Skybox Capital, Chicago, IL
 Brady Marlow, Carson Wealth, Lincoln, NE
 Andrew McManara, Dowling and Yahnke, San Diego, CA
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 Andrew Poffel, Merrill Lynch Wealth Mgmt., New York, NY
 Tod Potter, Wells Fargo Advisors, Houston, TX
 Jane Rahe, Fifth Third Bank, Toledo, OH
 Mackenzie Richards, SK Wealth Mgmt., Providence, RI
 Ross Richardson, Pembroke Advisors, Bush, LA
 Patrick Ricketts, Vintage Financial Group, Omaha, NE
 Matthew Roberts, U.S. Bank Private Wealth Mgmt., Los Angeles, CA
 Andrew Roed, Baird, Bellevue, WA
 Cam Roehl, Plante Moran, Southfield, MI
 Brian Salerno, CNR, Lake Mary, FL
 Shawn Sanger, Wells Fargo Advisors, Omaha, NE
 Robert Schuckmann, SunTrust, now Truist, Atlanta, GA
 Brandon Schwab, Eaton Vance WaterOak Advisors, Altamonte Springs, FL
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 Michael Stephens, Fiduciary Trust Company, Wellesley, MA
 Richard Stonger, Merrill Lynch, Colorado Springs, CO
 Scott Thomas, Edward Jones, St. Louis, MO
 David Tovey, Edward Jones, Alexandria, VA
 John Traynor, Fiduciary Trust International, Garden City, NY
 Benjamin Voigt, Northwestern Mutual, Chicago, IL
 Dalton Waldrop, Merrill Lynch, Erie, CO
 Matt Walker, Charles Schwab & Co., Corte Madera, CA
 Lisa Walsh, The Walsh Group of Raymond James, Buffalo, NY
 Brent Webster, Wells Fargo Advisors, Reno, NV
 Kevin Wells, Wells Financial Group, Indianapolis, IN
 Zachary Whitchurch, Wells Fargo Advisors, Salt Lake City, UT
 Elvie White IV, Merrill Lynch Wealth Mgmt., Wilson, NC
 Brad Wilder, Fifth Third Bank, Cincinnati, OH
 Tyler Willis, UMB, Leawood, KS
 Brian Wood, TD Ameritrade, San Diego, CA
 Ryan Woolhiser, City National Rochdale, Dallas, TX
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