

RECENT CIMA® AND CPWA® CERTIFICANTS

THE FOLLOWING INDIVIDUALS RECENTLY EARNED THE CIMA® CERTIFICATION:

Andrew Bell, JRA Financial, Medina, MN
Daniel Corrigan, Corrigan Financial, Newport, RI
Katherine Fleischmann, Key Investment Services, Amsterdam, NY
Jessica Hooyenga, American Funds Distributors, Ostrander, OH
Satoko Hoshino, Deloitte Touche Tohmatsu, Bunkyo-ku, Tokyo, Japan
Albert Kim, Northern Trust, Willowbrook, IL
Jason Mashas, Van Eck, Dallas, TX
Peter Noone, Principal Financial Group, Mercer Island, WA
Frances Pascua, Merrill Lynch, San Diego, CA
Kathryn Richwine, Cornerstone Management, Peachtree Corners, GA
Max Rooney, TIAA, South Burlington, VT
Samuel Wright, Merrill Lynch, Cumming, GA

THE FOLLOWING INDIVIDUALS RECENTLY EARNED THE CPWA® CERTIFICATION:

Brian Adamek, SBI Wealth Management, Bloomington, MN
Megan Balkowitsch, Northern Trust, Minneapolis, MN
Douglas Bilenski, Merrill Lynch, Towaco, NJ
Matt Borowski, True North Advisors, Dallas, TX
Michael Chabalik, UBS Financial Services, Victor, NY
Nicholas Cirbo, Oppenheimer Funds, Thousand Oaks, CA
Nathan Clark, Merrill Lynch, East Lansing, MI
John DeFonso, Aqua Capital Advisors, Los Angeles, CA
Matthew DiBetta, Merrill Lynch, Glen Rock, NJ
Thomas Donahue, Merrill Lynch, New York, NY
Susan Edwards, Merrill Lynch, Beverly Hills, CA
Javier Escamilla, The Capital Group—Private Client Services, Los Angeles, CA
Fadi Farhan, Merrill Lynch, Chicago, IL
Erik Finwall, Voya Investment Management, Fishers, IN
Christopher Gallo, UBS Financial Services, Santa Barbara, CA

Jeffrey Harvey, Merrill Lynch, Wayne, PA
Shaun Hawkins, Merrill Lynch, Portland, ME
John Lin, Morgan Stanley, San Francisco, CA
Adam Loveless, Merrill Lynch, Houston, TX
John Mays, UBS Financial Services, The Woodlands, TX
Jarrett Meadors, Merrill Lynch, Charlotte, NC
Brian Murello, TIAA, Pittsburgh, PA
Tahira Neal, Merrill Lynch, Newport Beach, CA
Gordon Nearing, Merrill Lynch, Stuart, FL
Christopher Niles, UBS Financial Services, Pompano Beach, FL
W. Paul Patterson, UBS Financial Services, Wilmington, NC
John Rumsey, Merrill Lynch, Durham, NC
Carlos Salmon, Key Investment Services, West Springfield, MA
Nickolas Smith, Schafer Cullen Capital Management, Dallas, TX
Gilbert Tong, Merrill Lynch, Beverly Hills, CA
Michael Ulrich, Merrill Lynch, Sun City, AZ
Ryan Winters, Morgan Stanley, San Francisco, CA
Vincent Zaccardi, Merrill Lynch, Burlington, MA
Nicholas Zaccardi, Jr., Merrill Lynch, Burlington, MA
Charles Zweifel, Northern Trust, St. Louis, MO

EDUCATIONAL PROGRAMS CALENDAR

LIVE EVENTS

MAY 6–9, 2018

Investments & Wealth Institute 2018 Annual
Conference Experience—ACE
Nashville, TN

JULY 12, 2018

Focus on Advanced Portfolio Construction
with ETFs
Boston, MA

SEPTEMBER 13–14, 2018

Advanced Business Strategist in conjunction
with The Wharton School, University of
Pennsylvania
Philadelphia, PA

SEPTEMBER 28, 2018

Behavioral Finance for Advisors
Toronto, ON

OCTOBER 8–9, 2018

Wealth Advisor Forum
Chicago, IL

NOVEMBER 15, 2018

Focus on Advising the Great Wealth Transfer
Phoenix, AZ

DECEMBER 3–4, 2018

Retirement Management Forum
Amelia Island, FL

CIMA CLASSES

JUNE 18–22, 2018

The Wharton School, Philadelphia

OCTOBER 1–5, 2018

The Wharton School, Philadelphia

OCTOBER 8–13, 2018

The University of Chicago Booth School
of Business

*Yale School of Management online program,
contact jim@dobbseducation.com
(ongoing enrollment)*

CIMA CERTIFICATION EXAM TESTING MONTHS FEBRUARY, MAY, AUGUST, NOVEMBER

CPWA CLASSES (In-Class Executive Education)

JUNE 3–8, 2018

Investments & Wealth Institute-Sponsored
Hilton Chicago/Oak Brook Hills Resort and
Conference Center

SEPTEMBER 23–28, 2018

The University of Chicago Booth School
of Business

*Yale School of Management online program,
contact jim@dobbseducation.com
(ongoing enrollment)*