Exceptional Advisor Initiative Helps Showcase Certifications to Clients

By Greta Gloven

The Investments & Wealth Institute has launched a new initiative to help Certified Investment Management Analyst® (CIMA®), Certified Private Wealth Advisor® (CPWA®), and Retirement Management Advisor℠ (RMA℠) certificants showcase their advanced knowledge, expertise, and certifications to clients.

Announced at the Annual Conference Experience—ACE Nashville, the Exceptional Advisor™ initiative helps advisors differentiate themselves from other professionals in a global and highly competitive marketplace. By concentrating on areas identified through research as key attributes valued by clients, advisors can better demonstrate the advanced knowledge they have earned through certification.

AbsoluteEngagement.com (2017) defined "exceptional advisors" as those advisors who:

- understand clients' needs and values
- provide meaningful guidance
- demonstrate advanced knowledge
- act ethically

DIGITAL TOOLKIT

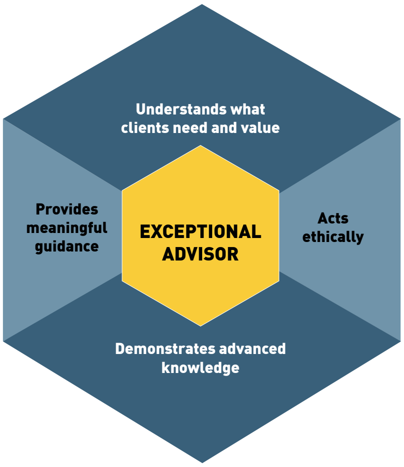
As part of the the initiative, The Institute has prepared an Exceptional Advisor Toolkit that can be accessed digitally through the member dashboard at www.investmentsandwealth.org. The toolkit includes resources that advisors can use to demonstrate how their advanced knowledge and certifications benefit clients. Advisors can choose from a variety of communication tools including brochures, templates, or an investor-focused website, www.InvestmentHelp.org. Advisors will find a selection of advisor learning resources. Member certificants also can find certification-specific client materials created to showcase the competencies provided by their certifications, and they may order 25 CIMA- and/or CPWA-specific client brochures at no charge.

EXCEPTIONAL ADVISOR ONLINE COURSE

The Exceptional Advisor: Communicate Your Value & Build Client Engagement is an online course that will help advisors understand the traits of an exceptional advisor, explore the importance clients place on advisor knowledge, and educate advisors about how to communicate their expertise and credentials more effectively. Throughout the course, participants will acquire practical strategies and skills, culminating in plans that will help enhance the advisor-client relationship.

WALL STREET JOURNAL AND *BARRON'S* ADS FEATURE INSTITUTE CERTIFICATIONS

In addition to tools, the Exceptional Advisor initiative has created an advertising campaign that is running digitally across numerous platforms, including LinkedIn and Facebook. Print advertisements also have been placed in the *Wall Street Journal* and *Barron's* to



highlight the attributes of an exceptional advisor and to encourage investors to seek CIMA and CPWA credentialed advisors.

MORE TOOLS TO ROLL OUT

Over the next year-and-a-half, more resources will be made available. Members can expect additional tools (such as podcasts, website copy, sample letters, etc.) to roll out quarterly. Visit the Exceptional Advisor Toolkit landing page to view the latest resources and learn more about this initiative (http://investmentsandwealth.org/exceptional-advisor-toolkit).

Greta Gloven is the Institute's director of communications. Contact her at ggloven@i-w.org.

REFERENCE

AbsoluteEngagement.com and Investments & Wealth Institute. 2017. Investments & Wealth Client Research 2017. http://investmentsandwealth.org/getmedia/b32fa3e4-664a-41e1-bbe7-a1ba17d696e7/17-Client-Engagement-updated.pdf.