

RECENT CIMA®, CPWA®, AND RMA® CERTIFICANTS

The following individuals recently earned the CIMA® certification:

Anthony Antonetti, Eaton Vance, South Weymouth, MA
 Donald Atherton, UBS Financial Services, The Woodlands, TX
 Matthew Berger, Lincoln Financial Group, King of Prussia, PA
 James Binsfeld, Chicago Teachers' Pension Fund, Chicago, IL
 Olivia Biron, Merrill Lynch, Boston, MA
 Richard Blacharski, Union Bank, Seattle, WA
 Timothy Bowers, Kennedy Partners, Sydney, Australia
 Jennifer Bruckner, Merrill Lynch, Chicago, IL
 Adam Bullock, Industry Fund Services, Lalor, Victoria, Australia
 Ryan Burcham, T. Rowe Price, Colorado Springs, CO
 Sean Burke, Franklin Templeton, Rancho Cordova, CA
 Anthony Roc Byrd, Clearwater Capital Partners, Hoffman Estates, IL
 Joseph Byron, Fidelity, Charleston, SC
 Samuel Carpin, Ellis Investment Partners, Berwyn, PA
 Michael Chewning, Charles Schwab Investment Mgmt., Erie, CO
 Denise Chin Quee, Merrill Lynch, Miami, FL
 William Christie, LPL Financial, Shaker Heights, OH
 Andreas Christopoulos, MFS, Boston, MA
 Jason Coleman, McLaren Wealth Strategies, Ann Arbor, MI
 Robert Coleman, Foster Victor Wealth Advisors, Greenville, SC
 Emma Cook, Magellan Financial Group, Sydney, Australia
 David Crosland IV, U.S. Trust, Bank of America Private
 Wealth Mgmt., Davidson, NC
 Dina Damayanti, Franklin Templeton Investments Association,
 Melbourne, Australia
 John Daniels, Merrill Lynch, Latham, NY
 Nicole Davis, Veris Wealth Partners, Portsmouth, NH
 Allison Dawe, Thornburg Investment Mgmt., Santa Fe, NM
 Daniel DeBarros, Financial Services, Louisville, KY
 Robert DiCicco, Morgan Stanley, Dallas, TX
 James Edwards III, UBS Wealth Mgmt., Beverly Hills, CA
 Timothy Egger, Kabel Financial Services, West Chatswood,
 New South Wales, Australia
 Scott Fitzgerald, Steel Ridge Advisors, Islandia, NY
 Kevin Folks, Capital Group, Sayville, NY
 Kevin Frevert, Merrill Lynch, Leawood, KS
 Daniel Galindo, Janus Henderson Investors, Arvada, CO
 Autrey Gates, Eaton Vance, Boston, MA
 Jordan Gluskin, Polen Capital, Boca Raton, FL
 Gregory Goin, Allianz, Carver, MN
 Ian Gookin, Franklin Templeton Investments, Folsom, CA
 Teodora Grant, USI Advisors, Dallas, TX
 Aditi Grover, Vanguard Investments, Sydney, Australia
 Kimberly Guha, UBS Financial Services, San Diego, CA
 Jason Haruki, First Hawaiian Bank, Honolulu, HI
 Clifford Heidinger, American Funds, Portsmouth, NH
 Sylvia Helfrich, T. Rowe Price, Colorado Springs, CO
 Aleksander Henka, Merrill Lynch, Costa Mesa, CA
 David Hicks, JPMorgan Asset Mgmt., Columbus, OH
 Rowland Hill, AllianceBernstein, Sydney, Australia
 Ernest Holguin, Presidio Group Wealth Mgmt., Walnut Creek, CA
 Benjamin Hooper, USAA, New Braunfels, TX
 Gary Horby, John Hancock Investment Mgmt., Frisco, TX
 David Hultstrom, Financial Architects, Woodstock, GA

Robert Hutchinson, Hartford Funds, Allentown, PA
 Edwin Janeczek, Zacks Investment Mgmt., New Albany, OH
 Geoffrey Jarocki, Resolute Investment Managers, Irving, TX
 Liam Jones, Merrill Lynch, Canfield, OH
 Vanessa Kasprzyk, Vanguard, Tampa, FL
 Curtiss Kaufman, Merrill Lynch, Frisco, TX
 David Keller, Huntington Bank, Strongsville, OH
 Ethan Kelly, Providence Capital Mgmt., Brandon, MS
 Oliver King, CH Warman Group, Pymble, New South Wales, Australia
 Travis Klein, John Hancock Investments, Newport Beach, CA
 Leonard Kortekaas, Merrill Lynch, Los Angeles, CA
 Orion Kroeger, Kroeger Financial, Grass Valley, CA
 Daniel Lajcay, JP Morgan, Southfield, MI
 Courtney Lang, Vanguard, Philadelphia, PA
 Scott Lanz, Merrill Lynch, Kew Gardens, NY
 Patrick Levendusky, Nuveen Investments, Pittsburgh, PA
 Thomas Licwinko, Sterling Advisors, Perkasie, PA
 Daniel Liffman, Bank of America Merrill Lynch, New York, NY
 Jennifer Litton, The Patten Group, Chattanooga, TN
 Edil Llanos, SunTrust Investment Services, Orlando, FL
 Brian Lott, Russell Investments, Vancouver, WA
 Brooke Lowery, Morgan Stanley, Vancouver, WA
 Michael Manna, BOK Financial, Dallas, TX
 David Marshall, Tortoise Capital, Apopka, FL
 Shannon McCartan, Vanguard Group, Philadelphia, PA
 Daniel McLennon, Voya Investment Mgmt., Dunwoody, GA
 John McLoughlin, Hennion and Walsh, Wall Township, NJ
 Brenden Melrose, Halbert Hargrove, San Diego, CA
 Jessica Merino, Merino Wealth Mgmt., Chicago, IL
 Erik Meyer, American Beacon Advisors, Irving, TX
 Kevin Miller, PT Asset Mgmt., Indianapolis, IN
 Tyler Miller, Frost Investment Advisors, San Antonio, TX
 Andre Misdary, The Concord Advisory Group, Jackson, NJ
 Ioannis Mitsis, Merrill Lynch Wealth Mgmt., Ponte Vedra Beach, FL
 Peter Monks, Kovack Advisors, Fort Lauderdale, FL
 Awad Morgan, Ameriprise Financial, Washington, DC
 Susan Morris, American Century Investments, Kansas City, MO
 James Myers, Merrill Lynch, Atlanta, GA
 Edmund Nasser, Macquarie Group, Norman Park, Queensland,
 Australia
 Scott Neuendorf, Luther King Capital Mgmt., Austin, TX
 Christopher Nix, Leavell Investment Mgmt., Mobile, AL
 William O'Brien, Van Eck Securities Corporation, North Reading, MA
 Matt Ohme, Allianz Life Financial Services, Chaska, MN
 Brittney Olinger, BNP Paribas, London, United Kingdom
 Peter Olsen, Capital Group, Avon, CT
 Carissa Palm, Allianz, Edina, MN
 Robert Parkinson, Nikko Asset Management, Murrumbidgee,
 Victoria, Australia
 Keith Pitters, Ackerman Capital Mgmt., Dallas, TX
 John Prosperi, Guggenheim Investments, Chicago, IL
 Steven Prumo, Merrill Lynch, Towson, MD
 Steve Duagrello, American Funds, Fairport, NY
 Paul Ramsay, Franklin Templeton Investments, South Melbourne,
 Victoria, Australia
 Whitney Randolph, UBS Financial Services, Houston, TX

Joshua Regnaud, Morgan Stanley, Gulf Breeze, FL
 Lesley Reinhart, Russell Investments, Wexford, PA
 Christopher Ribe, Morgan Stanley, San Diego, CA
 Robert Rijo, Merrill Lynch, New York, NY
 Alex Robinette, Raymond James & Associates, Tampa, FL
 Daniel Rodriguez, Franklin Templeton, St. Petersburg, FL
 Aaron Rottenstein, UBS Financial Services, Tucson, AZ
 Romolo Rottura, American Funds Distributors, Wilmington, DE
 David Sassen, Merrill Lynch, El Segundo, CA
 Christopher Schwartz, T. Rowe Price, Columbia, MD
 Wesley Scoggin, Franklin Templeton Investments, Rancho Cordova, CA
 Kristin Seward, PNC Institutional Asset Mgmt., Indianapolis, IN
 Michael Shearin, Morgan Stanley, Dunbarton, NH
 Gerrit Shuffstall, Merrill Lynch, Baltimore, MD
 Richard Sims, Guggenheim Investments, Oak Forest, IL
 George Smith, Smith Bruer Advisors, Tallahassee, FL
 Constantine Stathopoulos, Morgan Stanley, Northbrook, IL
 Michael Triolo, Morgan Stanley, Loudonville, NY
 Darek Turpin, Springs Valley Bank & Trust, Dubois, IN
 Patrick Vance, Capital Group, Phoenix, AZ
 Michael Vazquez, Endurance Wealth Partners, New York, NY
 Stafford Viator, Wells Fargo Advisors, Metairie, LA
 Franco Villanueva-Meyer, D.A.W., Dorado, PR
 Luke Violette, GYL Financial Synergies, New Britain, CT
 Michael Volpe, Hartford Funds, Wayne, PA
 Sarah Walter, John Hancock Investments, Jamaica Plain, MA
 Michelle Wilbur, Ameriprise Financial, Roseville, CA
 Jan Zambrano, Santander, Miami, FL
 Joseph Zarzycki, BB&T, Richmond, VA
 Jacob Ziegler, T. Rowe Price, Colorado Springs, CO

The following individuals recently earned the CPWA® certification:

Christian Abboud, Merrill Lynch, Florham Park, NJ
 Xavier Aguayo, UBS Financial Services, San Juan, PR
 Stewart Anderson III, UBS Financial Services, Franklin, TN
 Megan Andrews-Covell, Charles Schwab, Lone Tree, CO
 Elizabeth Angelone, Merrill Lynch, Greenwich, CT
 Ben Archer, UBS Financial Services, Flouertown, PA
 Daniel Arnold, UBS Financial Services, Fort Wayne, IN
 Wyatt Arthurs, UBS Financial Services, Buffalo, NY
 James Barry, Merrill Lynch, New Hope, PA
 Ruben Benharrouch, Merrill Lynch, Miami, FL
 Charles Bennett, Merrill Lynch, Wichita, KS
 Brian Bonvechio, Merrill Lynch, Los Angeles, CA
 Christopher Bostick, Merrill Lynch, La Jolla, CA
 Robert Brosker, Morgan Stanley, Baltimore, MD
 Michelle Brown, Mosaic Family Wealth, St. Louis, MO
 Brian Buetel, UBS Financial Services, Boca Raton, FL
 Rachael Burns, Ameriprise, Roseville, CA
 Barclay Callender, LPL Financial, Henderson, NV
 Eric Carter, UBS Financial Services, Weston, CT
 Joseph Catalano, Bank of America Merrill Lynch, Park Ridge, IL
 Kenneth Cattlet, UBS Financial Services, Wilmington, NC
 Maria Del Pilar Catoni, Banco Popular, San Juan, PR
 Andrew Cook, Wells Fargo Advisors, Glenmont, NY

Kevin Cook, UBS Financial Services, Broussard, LA
 Ken Crawford, Merrill Lynch, Roseville, CA
 Colton Creamer, Merrill Lynch, San Antonio, TX
 Kyle DeRaedt, Spahn Financial, Lombard, IL
 Michael Douvadjian, UBS Financial Services, Boston, MA
 Kerri Duffy, Fidelity Investments, Glenview, IL
 Chris Duncan, Charles Schwab, Orlando, FL
 Timothy Edborg, UBS Financial Services, Jamestown, NY
 Steve Fairfax, UBS Financial Services, Tacoma, WA
 Louis Farr, Merrill Lynch, Chicago, IL
 Curtis Fessler, Regions Bank- Private Wealth Mgmt.,
 League City, TX
 Jim Fitzgerald, Northwestern Mutual, Richmond, VA
 Regan Flaherty, Wells Fargo Advisors, Portland, ME
 Andrea Fletcher, Larson Financial Group, Denver, CO
 Paul H. Francis, Quadrant Private Wealth, Bethlehem, PA
 John Frederich, Frederich Family Wealth Advisors, Pasadena, CA
 Emily Frenzel, UBS Financial Services, Center Valley, PA
 Christina Frerks Inslee, Merrill Lynch, Portsmouth, NH
 Matthew Gallo, Merrill Lynch, Walnut Creek, CA
 Gregory Garcia, Merrill Lynch, Colorado Springs, CO
 Ryan Giacomarro, UBS Financial Services, Pepper Pike, OH
 Patrick Gibbs, Wintrust Wealth Mgmt., Chicago, IL
 Maxwell Glasheen, Merrill Lynch, Granite Bay, CA
 Paula Gonzales, Merrill Lynch, Tucson, AZ
 Michael Gorman, Merrill Lynch, White Plains, NY
 Clinton Graves, Raymond James & Associates, San Francisco, CA
 Henry Grinberg, Raymond James, Aventura, FL
 Sheri Gunnari, Merrill Lynch, Portland, OR
 Jessica Guo, UBS Financial Services, Wellesley, MA
 Christina Gustin, UBS Financial Services, San Diego, CA
 Mike Haggerty, UBS Financial Services, New Haven, CT
 Sheila Hale, Merrill Lynch, Spanish Fort, AL
 Oscar Ham, Sound View Wealth Advisors, Savannah, GA
 James Hart, Merrill Lynch, Albany, NY
 Marianne Hayes, Charles Schwab, Lone Tree, CO
 Jeffrey Hearn, Raymond James & Associates, St. Petersburg, FL
 Elinor Ho, Secure Planning Strategies, Southfield, MI
 John Holst, Merrill Lynch, West Islip, NY
 Kyle Hublitz, UBS Financial Services, Westport, CT
 David Hultstrom, Financial Architects, Woodstock, GA
 Larry Hyatt, Merrill Lynch, Pierce, Fenner & Smith, Salem, OR
 Susan Jann, Goelzer Investment Mgmt., Fishers, IN
 Amy Jones, Merrill Lynch, Louisville, KY
 Sean Jucas, Merrill Lynch, Chicago, IL
 Rachel Kanter, Merrill Lynch, San Francisco, CA
 Lisa Kautz, Merrill Lynch, Wellesley, MA
 Sean Kelly, Merrill Lynch, Everett, WA
 Kathleen Kenealy, Boston Private, Boston, MA
 Richard Ketner, UBS Financial Services, Greensboro, NC
 Karen Kurrasch, UBS Financial Services, New York, NY

Bradley Lacore, WaterOak Advisors, Winter Park, FL
 John Lacy, The Lacy Group/Merrill Lynch, West Palm Beach, FL
 Eric Leinwand, Morgan Stanley, Portland, ME
 Jean Pierre Lemoine, Merrill Lynch, Aventura, FL
 Jonathan Levine, UBS Financial Services, Portland, OR
 Paul Lightfoot, Optima Asset Mgmt., Dallas, TX
 Ruby Lin, Merrill Lynch GWM, Palo Alto, CA
 Julian Lopera, Merrill Lynch, Miami, FL
 Jason Lord, UBS Financial Services, Denver, CO
 Jason Lowy, UBS Financial Services, Hunt Valley, MD
 Christopher MacFarlane, Robert W. Baird, Naples, FL
 Mary Macukas, UBS Financial Services, Santa Fe, NM
 Renee Maloney, SunTrust Banks, Winter Park, FL
 Adam Marfurt, TD Ameritrade, Hinsdale, IL
 Carlos Marranzini, Merrill Lynch, Miami, FL
 Mark McLeland, Merrill Lynch, Fort Worth, TX
 Tyler Mehlhorn, Charles Schwab, Phoenix, AZ
 Benjamin Mihalik, Morgan Stanley Wealth Mgmt., New York, NY
 Jason Miller, BMO Private Bank, Scottsdale, AZ
 Christopher Morley, Merrill Lynch, Bedford, NY
 Walter Mould, Merrill Lynch, New York, NY
 Vishal Muni, Wealth Planning Advisory Group, Bernardsville, NJ
 William Neal, Merrill Private Wealth Mgmt., Chicago, IL
 Todd Nichols, UBS Financial Services, Fort Lauderdale, FL
 Robert Norton, Merrill Lynch, Annapolis, MD
 G. Michael O'Neil, Merrill Lynch, Darien, CT
 Andrea Orlando-Skewis, Merrill Lynch, Roseville, CA
 Brandon Ostlund, Merrill Lynch, Long Lake, MN
 Rob Overall, WaterOak Advisors, Winter Park, FL
 Mil Parekh, Morgan Stanley, McLean, VA
 Michael Pearson, UBS Financial Services, Wilmington, NC
 Michael Pence, UBS Financial Services, Houston, TX
 Nicholas Peterson, Merrill Lynch, Annapolis, MD
 Kharmia Powell, Merrill Lynch, Princeton, NJ
 Anitha Rao, Financial Architects, Woodstock, GA
 Nihaa Rao, Merrill Lynch, Phoenix, AZ
 Eric Raphael, Merrill Lynch, New York, NY
 Timothy Rauwald, UBS Financial Services, Chapel Hill, NC
 Randy Reed, Merrill Lynch, Clinton, OH
 Jared Reynolds, Wilkerson & Reynolds Wealth Mgmt.,
 Columbia, MO
 Mitchell Riesenberger, UBS Financial Services, Boston, MA
 Christine Robinette, Fragasso Financial Advisors, Pittsburgh, PA
 Luis Sabido Bollain Goytia, Private Capital Mexico, Cuajimalpa,
 Mexico City, Mexico
 Brandon Schwan, Fragasso Financial Advisors, Pittsburgh, PA
 Lauren Semeniuta, Dimensional Fund Advisors, Santa Monica, CA
 Brandon Shaw, MassMutual, Germantown Hills, IL
 Andrew Sinsgalli, Merrill Lynch, San Jose, CA
 Stephanie Smith, Southern Wealth Mgmt. San Antonio, TX
 Gretchen Spreitzer, Northern Trust, Chicago, IL

Bonnie Suther, UBS Financial Services, Winston-Salem, NC
 Barton Talkington, UBS Financial Services, Dallas, TX
 Nader Tamadon, Merrill Lynch, Alexandria, VA
 Sheridan Tanner, Merrill Lynch, New Orleans, LA
 Christopher Tooker, Harrison Financial Services, Omaha, NE
 Caleb Tsang, VinePoint Advisory Group, Pasadena, CA
 James Tucker, SunTrust Investment Services, Tampa, FL
 John Turcic, Vernal Point Advisors, San Francisco, CA
 Eric Uhlberg, UBS Financial Services, Denver, CO
 Andrew Urbanski, UBS Financial Services, New York, NY
 David Van Lenten, Merrill Lynch, Augusta, GA
 Trent Von Ahsen, United Iowa Financial, Cedar Rapids, IA
 William Wahl, Merrill Lynch, Chesterfield, MO
 Joshua Weber, Morgan Stanley, Marietta, GA
 Eli Weissman, Scott & Stringfellow, McLean, VA
 Jeremiah Winters, Salomon & Ludwin, Richmond, VA
 Jaime Wright, Merrill Lynch, New York, NY
 Kevin Young, UBS Financial Services, Newtown, PA

The following individuals recently earned the RMA® certification:

Luis Alayo-Riera, The Atlas Financial Group, Miami Beach, FL
 Ronice Barlow, Franklin Templeton, St. Petersburg, FL
 Edward Barno, Rockbridge Investment Mgmt., Syracuse, NY
 Ryan Bettencourt, Franklin Templeton, Elk Grove, CA
 Del Biech, Scotia McLeod, Regina, SK, Canada
 Patrick Bischoff, Merrill Lynch, Reston, VA
 Erin Cominole, Merrill Lynch Wealth Mgmt., Troy, NY
 Darien Croce, Parallel Wealth Mgmt., Redding, CA
 Angela Davis, Merrill Lynch, Cape Coral, FL
 Howard Eisenberg, WealthTec, Fulton, MD
 Jonathan Elks, Boerum Hill Financial Advisors, Brooklyn, NY
 James Galloway, Jr., Alex Brown, a division of Raymond James,
 Winston-Salem, NC
 Michael Henley, Brandywine Oak Private Wealth,
 Kennett Square, PA
 Margaret Jackson, RBC Wealth Management, Annapolis, MD
 Brian Johnson, Eaton Vance, Edina, MN
 Eric Kala, Avid Wealth Partners/Northwestern Mutual
 Wealth Mgmt., San Antonio, TX
 Bryan Molinar, Wells Fargo Advisors, Los Angeles, CA
 Roger Mussa, Merrill Lynch, Egg Harbor Township, NJ
 Michael Noone, The Noone Group/Merrill Lynch, Red Bank, NJ
 Milton Nuckols, Wells Fargo Advisors, St. Augustine, FL
 Sean O'Malley, Franklin Templeton, San Mateo, CA
 Stephen Ross, Merrill Lynch, Towson, MD
 Charles Simonton, Merrill Lynch, Suttons Bay, MI
 Laura Walsh, Lifespan Financial Strategies, Weston, FL
 Steve Walter, Morgan Stanley, Lake Oswego, OR
 Gregory Will, Bestgate Wealth Advisors, Frederick, MD

EDUCATIONAL PROGRAMS

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