

RECENT CIMA® CERTIFICANTS

THE FOLLOWING
INDIVIDUALS RECENTLY
EARNED THE CIMA®
CERTIFICATION

Jeffery Albaneze, BDO Wealth Advisory, Jacksonville, FL
 Ryan Antonacci, Merrill Lynch, New York, NY
 Pedro Arruda, Wells Fargo Advisors, Miami, FL
 Lyndon Arthurson, Harris Fraser, Drummond, Australia
 Randy Aun, JPMorgan Asset Mgmt., Columbus, OH
 Steven Backus, J.P. Morgan, Columbus, OH
 Michael Baker, Vertex Capital Advisors, Rock Hill, SC
 Mark Barile, Capital Group, San Antonio, TX
 Todd Barker, Bank of America Merrill Lynch, Cedar Rapids, IA
 Ronaldo Barron, American Century Investments, Kansas City, MO
 Nick Baseel, Deutsche Bank, Hopkinton, MA
 Thomas Bauer, T. Rowe Price, Mission Hills, KS
 Tim Beaufait, JPMorgan Chase & Company, Columbus, OH
 Katrina Bell, Deschutes Investment Consulting, Portland, OR
 Andrew Bennis, BlackRock, San Francisco, CA
 Steven Benvin, Morgan Stanley, New York, NY
 Stefan Bernardi, Invesco, Minnetonka, MN
 Justin Bernier, Morgan Stanley, Hartford, CT
 Ravish Bhatta, Merrill Lynch, San Francisco, CA
 Roger Bianco, Jr., Capital Group, Castle Pines, CO
 Jack Bishop III, Edward Jones, Waynesville, NC
 Leland Bishop, UBS Financial Services, Washington, DC
 Brandon Blackford, Edward Jones, Maineville, OH
 Marek Blaskovic, Capital Group/American Funds, Bay Harbor Islands, FL
 Bret Bledsoe, Merrill Lynch, Fayetteville, NC
 Ninya Bowman, Wells Fargo Advisors, Suwanee, GA
 Shane Boyle, PIMCO Investments, Newport Beach, CA
 Timothy Brand, Franklin Templeton Investments, St. Petersburg, FL
 Jackson Brandstetter, Morgan Stanley, Chicago, IL
 James Brauer, TIAA, Denver, CO
 Marlene Bravo, Franklin Templeton, Rancho Cordova, CA
 Corbin Briggs, AssetMark, Chicago, IL
 Nicholas Burke, Jackson National, Redwood City, CA
 Laura Byars, JP Morgan Securities, Atlanta, GA
 Shalene Caldwell, Wells Fargo Advisors, Portland, OR
 Patrick Campbell, Clearwater, FL
 Eric Candelori, Merrill Lynch, Vienna, VA
 Chad Cannady, Capital Group Companies, Noblesville, IN
 Jeffrey Carlos, JC Investment Services, La Mesa, CA
 Brian Carlson, Jackson National Life Distributors, Danville, CA
 Andres Castano, Merrill Lynch, Danvers, MA
 Enrico Castelda, RBC, Aurora, CO
 Thomas Caulfield, Oppenheimer Funds, Eden Prairie, MN
 Jeffrey Cedarholm, Longview Financial Advisor, Gadsden, AL
 Jeremy Chambers, Plante Moran Financial Advisors, Southfield, MI
 Pamela Chasin, UBS Financial Services, Greenwich, CT
 Sasha Childers, Townley Capital Mgmt., Laguna Hills, CA
 Elisabeth Christino, John Hancock Investments, Boston, MA
 Adam Clemens, AAM, Oak Lawn, IL
 Ryan Cooke, BB&T Scott & Stringfellow, Greensboro, NC
 Jacob Cooper, UBS Financial Services, Catlabasas, CA
 Martin Courage III, Columbia Threadneedle Investments, Boston, MA
 Robert Cousar, TIAA, Charlotte, NC
 Erin Cover, Vanguard, Dallas, TX
 Alex Crawford, PBMares, Williamsburg, VA
 Katie Cronin, Franklin Templeton, Rancho Cordova, CA
 Zachary Crump, Merrill Lynch, Hawthorne, NJ
 Bridget Cunningham, KeyBank, Syracuse, NY
 Michael Cure, Morgan Stanley, Cincinnati, OH
 George Dale, Atlantic Financial Partners, Fair Haven, NJ
 Lawrence Dallessandro, T. Rowe Price, Baltimore, MD
 Joshua Dautovic, Morgan Stanley, Hudson, OH
 Craig Davis, Jr., JP Morgan Chase, Huntington Beach, CA
 Nick Dawson, Franklin Templeton Investments, St. Petersburg, FL
 Serif Denktas, Charles Schwab, Denver, CO
 Mark DePrez, Wealth Advisors Group, Ft. Wayne, IN
 Bradley Dobin, Merrill Lynch, Manassquan, NJ
 Shane Donohue, Pioneer Investments, Boston, MA
 Michael Drake, Morgan Stanley, Reno, NV
 Isabelle Eckel, Morgan Stanley, Brighton, MA
 James Egnatchik, UBS Financial Services, Buffalo, NY
 Steven Elder, Thornburg Investment Mgmt., Auburn, WA
 Marvin Etienne, TIAA, Charlotte, NC
 Katrina Everett, Wells Fargo Advisors, Marietta, GA
 Graham Falbo, UBS Financial Services, Franklin Lakes, NJ
 Chris Fangmann, Touchstone Funds, Cincinnati, OH
 Ryan Farrell, Chicago, IL
 Patrick Farris, Janus Capital Group, Denver, CO
 Enrique Felix, Franklin Templeton, Sacramento, CA
 Steven Ferrari, JP Morgan, Miami Shores, FL
 Kenneth Finke, Merrill Lynch, McKinney, TX
 Joshua Finkelstein, Merrill Lynch Wealth Mgmt., Los Angeles, CA
 Craig Fisher, Tortoise Investments, Leawood, KS
 Joseph Fisher, Morgan Stanley, Grosse Pointe Park, MI
 Connor Fitzgerald, JP Morgan Asset Mgmt., Hoboken, NJ
 Kimberly Foley, Jensen Investment Mgmt., Portland, OR
 David Francis, Andersen Tax, McLean, VA
 Douglas Frank, Merrill Lynch Wealth Mgmt., Westlake Village, CA
 Jamie Frederick, PNC, Warren, PA
 Ralph Freibert III, Ameriprise Financial, New Orleans, LA
 Adam Freiman, Morgan Stanley, Washington, DC
 Camille Gagliardi, Ameriprise, West Hartford, CT
 Aldo Galiani, Merrill Lynch, Miami, FL
 John Gavin III, Nuveen, Midlothian, VA
 Dan George, AGW Capital Advisors, Tampa, FL
 Michael Geraci, Commonwealth Financial, San Diego, CA
 Claudia Glover, Wells Fargo, Leesburg, VA
 Eric Goodbar, BNY Mellon Wealth Mgmt., San Francisco, CA
 William Gorgas, Merrill Lynch, Bluffton, SC
 Matthew Grezlik, Ameriprise Financial Services, Chicago, IL
 Anthony Grose, Merrill Lynch, Dearborn, MI
 Michael Haile, ADP, Downingtown, PA
 Andrew Hancock, Morgan Stanley, Indianapolis, IN
 David Harvey, Jr., PNC, Pittsburgh, PA
 Ayaz Hasan, Morgan Stanley, Bethesda, MD
 Brendan Hayes, PIMCO, Fairfield, CT
 Jacob Haynes, Ivy Investments, Overland Park, KS
 Michael Head, Invesco, Charlotte, NC
 George Hedin IV, Franklin Templeton, Folsom, CA
 Christopher Helms, Columbia Threadneedle Investments, Boston, MA
 Derek Heuler, Federated Investors, Pittsburgh, PA
 Anthony Hixon, Hixon Zuercher Capital Mgmt., Findlay, OH
 Maura Holowchak, Wells Fargo Advisors, Columbus, OH
 Barnaby Horton, Merrill Lynch, Hartford, CT
 William Hummer, Robert W. Baird & Co., Milwaukee, WI
 Daniel Hunter, WisdomTree, Chicago, IL
 Brian Hussey, Morgan Stanley, Miami, FL
 Andrea Item, SunTrust Private Wealth, Coral Springs, FL
 Jeffrey Jackson, Janus Capital Group, Denver, CO
 Michael Jamison, OppenheimerFunds, Roseville, CA
 Brandon Janovsky, Merrill Lynch, Mound, MN
 Sean Jeffers, Rothschild Asset Mgmt., New York, NY
 Charles Johnson, Longview Financial Advisors, Gadsden, AL
 Eric Johnson, Roth Financial Partners, Kingwood, TX
 Andre Julian, Merrill Lynch Wealth Mgmt., Laguna Niguel, CA
 Winston Justice, Naples, FL
 Akiko Kamata, Merrill Lynch, Jericho, NY
 Kendra Kasznel, UBS Financial Services, Pittsburgh, PA
 Nathan Kaufman, J.P. Morgan Asset Mgmt., Charlotte, NC
 Andrew Kauth, UBS Financial Services, Denver, CO
 Scott Kavanagh, Federated Investors, Pittsburgh, PA
 Daniel Keefe, Columbia Threadneedle Investments, Boston, MA
 Roy Kelsey, 401k Generation, Longwood, FL
 James Kenary, Morgan Stanley, Worcester, MA
 Greg Kendall, Franklin Templeton, Elk Grove, CA
 Thomas Kerney, Hanover Securities, Orlando, FL
 Ryan Kidwell, The Capital Group, Dallas, TX
 Mark Kinsel, PNC Wealth Mgmt., Cincinnati, OH
 Jennifer Kirby, Merrill Lynch, Westfield, NJ
 Kristen Koch, Franklin Templeton, Rancho Cordova, CA
 Robert Kulczycki, Transamerica, Denver, CO
 Russell LaGreca, Graystone, Baltimore, MD
 Juan Landivar, Premia Global Advisors, Miami, FL
 Chris Laucus, Columbia Threadneedle Investments, Boston, MA
 Wilson Lee, Merrill Lynch, New York, NY
 Christopher Leo, Arlington, VA
 Alexander Leonida, Raymond James, Greenwood Village, CO
 Justin Levy, Federated Investors, San Francisco, CA
 Eric Lewis, JP Morgan, New York, NY
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 David Loman, Merrill Lynch, New York, NY
 Adam Lord, Morgan Stanley, Wyoming, PA
 Jameson Love, Doubleline Capital, Los Angeles, CA
 Joseph Lynch, Putnam Investments, Miami, FL
 Joseph Macaluso, OppenheimerFunds, New York, NY
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 David Madison, Estate & Trust Advisors, Northbrook, IL
 Michael Magnetta, Franklin Templeton Investments, St. Petersburg, FL
 Tiberiu Marian, Morgan Stanley, Sugar Hill, GA
 Storm Martin, Ivy Investments, Overland Park, KS
 Jacob McCabe, Virtus Investment Partners, Atlanta, GA
 Michael McClain-Svec, Wells Fargo Advisors, Pleasant Hill, CA
 Laura McDowell, Charles Schwab Investment Mgmt., San Francisco, CA
 John McCough, Brethren Benefit Trust, South Elgin, IL
 Patrick McHale, Diamond Hill Capital Mgmt., Columbus, OH
 Michael McHugo, John Hancock Investments, Boston, MA
 Craig McQueen, Cavanah Hill Investment Mgmt., Denver, CO
 Max McQuiston, Capital Group, Kaysville, UT
 Jeremy Merchant, RAA, Addison, TX
 Matthew Mignon, RegentAtlantic, Morristown, NJ
 James Miley, Hays Financial Group, Minneapolis, MN
 Stephen Miller, Merrill Lynch, Birmingham, AL
 Andrew Mintos, JPMorgan Chase, Chicago, IL
 Alycia Mitchell, Calamos Investments, Lombard, IL
 Craig Moore, Nationwide Financial, Tampa, FL
 Robert Moore, Pinnacle Investment Advisors, Tulsa, OK
 Matthew Mortimer, JPMorgan, New York, NY
 Rhett Mouchet, Brightworth, Atlanta, GA
 Lauren Mugavero, Bank of America Merrill Lynch, Pennington, NJ
 Francis Murnighan, Northern Trust - FlexShares ETFs, Chicago, IL
 Matthew Murphy, Oppenheimer & Co., Hoboken, NJ
 Caroline Nayton, Amundi Pioneer Asset Mgmt., Boston, MA
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 Jack O'Connor, UBS Financial Services, Seattle, WA
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 Rebecca Orlewitz, Veris Wealth Partners, New York, NY
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 Matthew Osheskie, Federated Investors, Oakmont, PA
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 Paul O'Toole, LPL Financial, Ft. Mill, SC
 Brian Pacen, The Sawyer Group, Owings Mills, MD
 Regulo Pacheco, Franklin Templeton, St. Petersburg, FL
 James Palombo, American Beacon Advisors, Irving, TX
 Jason Pan, Sullivan Bruyette Speros & Blayney, Fairfax, VA
 Kenneth Parrish, Franklin Templeton Investments, Little Rock, AR
 Andrew Parsons, Corrigan Financial, Middletown, RI
 Ashish Patel, Sugar Land, TX
 Ashley Patten, Oppenheimer Funds, Grand Rapids, MI
 Tahoe Peck, AXA, Wyckoff, NJ
 Marcus Persichetti, Federated Investors, Pittsburgh, PA
 Steven Pietricola, Eaton Vance, Baldwinville, NY
 Brandon Pisanos, Jackson National, Los Angeles, CA
 Oliver Polo, Merrill Lynch, San Diego, CA
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 Stephen Renie, Merrill Lynch, Cincinnati, OH
 Pierre Rieumont, JP Morgan Chase, Miami, FL
 Benjamin Roberts III, Merrill Lynch, Athens, GA
 Matthew Robinson, Capital Group, Atlanta, GA
 Scott Robison, CBIZ Financial Solutions, Olathe, KS
 Martin Roche, Russell Investments, Milwaukee, WI
 Ian Roche, Oppenheimer Funds, Chagrin Falls, OH
 Luke Roden, JP Morgan, Saratoga Springs, NY
 Lester Rodriguez, Merrill Lynch, Miami, FL
 Calvin Roseberry, Franklin Templeton, St. Petersburg, FL
 William Rouse, Corrigan Financial, Middletown, RI
 Matthew Russh, Capital Group, Fishers, IN
 David Samuel, Merrill Lynch, Tampa, FL
 Gary Sanchez, OppenheimerFunds, Lakewood, CO
 Stephen Schaefer, Franklin Resources, Rancho Cordova, CA
 Patrick Schultz, MainStay, New York, NY
 Sean Seese, Merrill Lynch, Wayne, PA
 Lisa Seigel, Merrill Lynch, Miami, FL
 Francis Seitz, MFS, Boston, MA
 Brian Shea, JP Morgan, Cedar Grove, NJ
 Trevor Shepherd, Morgan Stanley, San Jose, CA
 Walker Shiftet, Merrill Lynch, Beverly Hills, CA
 Daniel Shue, SunTrust Banks, Brentwood, TN
 Randy Smith, Fairway Financial, Orlando, FL
 Richard Smith, Cole Capital, Westerville, OH
 Samuel Snow, JP Morgan, New York, NY
 Andrew Spiro, Eaton Vance, Boston, MA
 Connor Spiro, Baystate Financial, Boston, MA
 Keith Stecker, South Orange, NJ
 David Stevens, Merrill Lynch, Rockledge, FL
 Justin Stevens, Merrill Lynch, Stamford, CT
 Parley Stock, American Beacon Advisors, Irving, TX
 Susan Swink, JP Morgan, New York, NY
 Claudia Tapara, Merrill Lynch, Frisco, TX
 James Taylor, Invesco, St. Louis, MO
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 Christopher Thomas, Merrill Lynch, Wellesley, MA
 Christopher Tooker, Merrill Lynch, Omaha, NE
 Ryan Uhle, T. Rowe Price, Baltimore, MD
 Adam Ulatoski, Merrill Lynch, Austin, TX
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 John Weilnau, UBS Financial Services, Conshohocken, PA
 Daniel Welch, Morgan Stanley, Cabin John, MD
 Brian Weverberg, BlackRock, Minneapolis, MN
 Andrew White, Vanguard, Valley Forge, PA
 John Williams, McKinley Carter Wealth Services, Charleston, WV
 Jeffrey Wright, Frost Investment Advisors, San Antonio, TX
 Ryan Young, Merrill Lynch Wealth Mgmt., Hunt Valley, MD