In this issue of Investments & Wealth Monitor, we focus on private wealth management and some of the unique challenges facing high-net-worth investors. We explore issues such as behavioral finance, trusts and estates, tax management, charitable giving, and investment management. Our articles align with the Certified Private Wealth Management® (CPWA®) curriculum, which is designed to provide education regarding the issues facing high-net-worth and ultra-high-net-worth investors.


We then transition to a few intriguing investment options, beginning with Kunal Shah and Tatiana Esipovich’s article, “Impact Investing in Focus,” followed by Kevin Maeda’s “Direct Indexing Separately Managed Accounts: A Tax-Efficient Solution.” Richard Roche offers an informative metaphorical twist in “Insurance Dedicated Funds: How to Beat Performance Drag,” and Alice Haseltine and Robert Kirkland provide important information about virtual currency in “Bit by Bit: Understanding Planning and Fiduciary Administration Aspects of Cryptocurrency.”

In “Chasing Performance,” Ralph Goldsticker reveals three behavioral signs that indicate you (or your client) may not be following conventional advice (not to chase performance). And Meir Statman reminds us, “Give with a Warm Hand: The Silver Lining of COVID-19.”

Finally, we include a Leadership Profile of Garry Bridgeman, past chair of IWI and co-chair of our new THRIVE initiative (see related article). I had the privilege of serving on the board with Garry and always appreciated his commitment to our organization and our profession.

As we enter autumn and volatility is re-emerging, we encourage you to turn to the Exceptional Advisor Webinar series, https://investmentsandwealth.org/webinars, which provides a deep-dive on topics covered in I&WM.

Stay safe and stay well!

Anthony B. Davidow, CIMA®
Chair, Investments & Wealth Monitor
Editorial Advisory Board

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