

# PROFESSIONAL DEVELOPMENT PROGRAMS

Tailored to fit the needs of today

For over 30 years, the Investments & Wealth Institute has been a staple in the financial community. Firms from all channels have turned to us to provide premier, Ivy League-quality education to help expand their knowledge base and level of expertise.

Financial advisors, investment consultants, and wealth managers rely on us to develop and implement curriculum that is relevant and tackles today's challenges. So, if your firm is looking to stay one-step ahead of your peers, look no further.

We offer a variety of educational training programs to help your firm maintain that leading-edge.



## What you'll gain:

- The ability to resolve complex issues facing individuals today
- Successful strategies for driving revenue
- Access to an array of subject matter experts and leading industry disruptors
- New skills and techniques to tackle investor predicaments
- Fresh and relevant content that reflect evolving subjects and topics
- Practical application solutions for today's market challenges
- An expanded network of academics, industry experts, practitioners and researchers

## What the Institute offers:

- Online and in-person executive certifications for individuals looking to deepen their knowledge:
  - Certified Investment Management Analyst® (CIMA®)
  - Certified Private Wealth Advisor® (CPWA®)
  - Retirement Management Advisor® (RMA®)
- Conference attendance
- Assessment-based certificate programs
- Short CE bundles—podcast style or traditional on-demand recordings (5-20 Hours).
- Webinars
- Association membership

Visit us online at [www.investmentsandwealth.org](http://www.investmentsandwealth.org)

Know others who would benefit? We offer referral bonuses and have group discounts and scholarships too. To learn more about eligibility, contact us at [sales@i-w.org](mailto:sales@i-w.org) or call 303-770-3377.

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