

*Find the Investments & Wealth Institute certification that's right for you.*

**CIMA®**  
CERTIFIED INVESTMENT  
MANAGEMENT ANALYST®

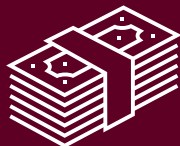
Specialized knowledge in  
manager search & selection,  
portfolio construction



**INVESTMENT  
ADVICE**

**CPWA®**  
CERTIFIED PRIVATE  
WEALTH ADVISOR®

Specialized knowledge  
to meet the needs of  
HNW individuals/families



**WEALTH  
ADVICE**

**RMA<sup>SM</sup>**  
RETIREMENT  
MANAGEMENT  
ADVISOR<sup>SM</sup>

Specialized knowledge focused on  
mastering the retirement planning  
advisory process.



**RETIREMENT  
ADVICE**

# CIMA<sup>®</sup> CERTIFIED INVESTMENT MANAGEMENT ANALYST<sup>®</sup>

CIMA certification is the peak international, technical portfolio construction certification designed for investment consultants, researchers, advisors, and wealth management professionals. The CIMA certification provides sophisticated investment knowledge, along with the practical techniques to meet the real-world needs of individual and institutional investors.

## WHAT ARE THE BENEFITS OF CIMA CERTIFICATION?

CIMA professionals are more satisfied with their careers and manage more assets for higher-net-worth clients than other advisors.

### EARN AN ELITE EDUCATION THAT IS HIGHLY PRACTICAL

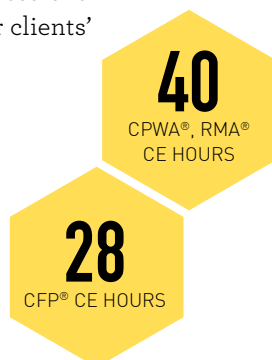
The CIMA curriculum is taught through an intensive executive education program with eminent academic and practitioner faculty. 54% of CIMA designees strongly agree that obtaining their certification was worth their time and effort compared to 41% of CFA, and 31% CPA/PFS certificants.



See website for class dates.

### GROW ASSETS AND REVENUE

CIMA professionals manage twice the assets per client and generate twice the revenue per client compared to other practices. 52% of practices with more than one CIMA professional advise high-net-worth (\$1 million to \$10 million) and ultra-high-net-worth (\$10 million+) clients. The majority of practices with a CIMA professional attract 75% or more of their clients' investment assets.



See website for details

### ENHANCE KNOWLEDGE, CONFIDENCE AND CAREER SATISFACTION

Over 60% of CIMA professionals indicate that obtaining CIMA certification had a considerable impact on their knowledge of investment management and their confidence in offering investment advice. 43% of CIMA professionals are “very satisfied” with their careers versus 21% of non-CIMA certified advisors.

## CIMA CORE TOPICS



Sources: Aite Value of CIMA Research, 2017; Absolute Engagement, Investments and Wealth Client Research, 2017

Learn more at [www.investmentsandwealth.org/GetCertified](http://www.investmentsandwealth.org/GetCertified)

# CPWA<sup>®</sup> CERTIFIED PRIVATE WEALTH ADVISOR<sup>®</sup>

Certified Private Wealth Advisor<sup>®</sup> (CPWA<sup>®</sup>) is an advanced certification for financial advisors and wealth managers who work with high-net-worth clients on the life-cycle of wealth: accumulation, preservation, and distribution. Candidates who earn the certification learn to identify and analyze challenges high-net-worth individuals face, and understand how to develop specific strategies to minimize taxes, monetize and protect assets, maximize growth, and transfer wealth.

## WHAT ARE THE BENEFITS OF CPWA CERTIFICATION?

### EARN AN ELITE EDUCATION THAT IS HIGHLY PRACTICAL.

The CPWA curriculum is taught through an intensive executive education program with eminent academic and practitioner faculty. It incorporates 169 topics organized into 11 sections and four knowledge domains that combine theory with practical application.



See website for class dates.

### DELIVER SPECIALIZED EXPERTISE AND SKILLS.

The explosion in global wealth in recent years means that not only are there more high-net-worth clients but also that the needs of these clients are increasingly sophisticated. 76% of clients say that if they were looking for a new advisor today, the specialized designations they held would be an important or very important factor in their decision.

### ACQUIRE AND RETAIN HNW CLIENTS.

CPWA<sup>®</sup> certification gives you the edge you need to stand out. 64% of CPWA-certified advisors state that the certification has been very or extremely important to them in “expanding client services” and “confidence with offering advice to HNW clients.” The mean assets per client of CPWA advisors (\$73.4 million dollars) is 3.9 times higher than non-CPWA practices (\$19 million dollars).

## CPWA CORE TOPICS

<b>Human Dynamics</b> <ul style="list-style-type: none"><li>• Ethics</li><li>• Behavioral finance</li><li>• Family dynamics</li></ul>	<b>Wealth Management Technical Design</b> <ul style="list-style-type: none"><li>• Tax planning</li><li>• Portfolio management</li><li>• Risk management and asset protection</li></ul>
<b>Legacy Issues</b> <ul style="list-style-type: none"><li>• Charitable giving and endowments</li><li>• Estate issues and wealth transfer</li></ul>	<b>Planning for HNW Clients</b> <ul style="list-style-type: none"><li>• Planning for executives</li><li>• Planning for closely-held business owners</li><li>• Retirement management</li></ul>



Sources: Aite Value of CPWA Research, 2017; Absolute Engagement, HNW Investor Insights Study, 2017

Learn more at [www.investmentsandwealth.org/GetCertified](http://www.investmentsandwealth.org/GetCertified)

See website for details

The Retirement Management Advisor<sup>®</sup> (RMA<sup>®</sup>) program is an advanced certification that focuses on building custom retirement income plans to mitigate clients' risks and master the retirement planning advisory process, all within the increasing regulatory environment.

## WHAT ARE THE BENEFITS OF THE RMA PROGRAM?

### MULTIDISCIPLINARY APPROACH TO RETIREMENT PLANNING

The RMA program maps a complete framework of the retirement planning universe. By presenting and evaluating several schools of thought, particularly on retirement allocation strategies and risk management techniques, advisors from any industry segment can adopt all or part of the best-practice processes.

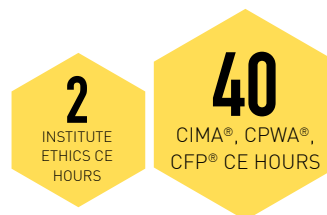
### BETTER UNDERSTAND THE CLIENT'S RETIREMENT MINDSET

Using a combination of behavioral finance, industry research, and practitioner experience, the RMA program can help to better understand the client's mindset at retirement, as they shift from accumulating and investing assets to funding retirement income. Since the program was developed, customized, and validated entirely from the client's perspective, it will also help improve communication, trust, and planning outcomes with clients.

### STRATEGIES FOR CUSTOM RISK ASSESSMENT AND UNBIASED SOLUTIONS

Guidance on risk-management techniques and solution strategies for each client segment, regardless of their income or assets, makes the RMA program truly product-neutral with unbiased solutions for every type of client. This client-centered, outcomes-based approach is at the heart of the program, first doing what is best for the client, no matter the product or the payout.

## RMA CORE TOPICS



See website for details