INVESTMENTS & WEALTH INSTITUTE™

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Sample News Release—CPWA®

Note: This is a sample news release to announce you earned the CPWA® certification. It can be customized by replacing the <bracketed> areas with your personal information.
(Place on Corporate/Personal Letterhead)

<Name> Earns Advanced Wealth Management Certification—Certified Private Wealth Advisor®

FOR RELEASE:
<Month Day, Year>

CONTACT:
<Name>
<Title/Organization>
<Phone>
<E-mail>

(First Paragraph ...if employed by a company)—<City, State>—<Month Day, Year>—<Name>, CPWA®, <your position> at <your company's name> in <City, State>, recently earned the Certified Private Wealth Advisor®certification, which is an advanced professional certification for advisors who provide the breadth of specialized skills required to meet the needs of high-net-worth clients. <Mr./Ms.> <Last name> has worked at <your company's name> since <year you started> and is responsible for <briefly describe your work responsibilities>
.

(First Paragraph ...if self-employed)—<City, State>—<Month Day, Year>—<Name>, CPWA®, <your position> at <your company's name> in <City, State>, recently earned the Certified Private Wealth Advisor® certification, which is an advanced professional certification for advisors who provide the breadth of specialized skills required to meet the needs of high-net-worth clients. <Mr./Ms.> <Last name> specializes in <briefly describe your work responsibilities and expertise>.

To earn certification, CPWA professionals must meet a five-year experience requirement, successfully complete coursework in advanced wealth management strategies, and pass a comprehensive examination covering 11 core topics, including applied behavioral finance, charitable giving, estate planning, and wealth transfer. To maintain certification, CPWA professionals must meet ongoing continuing education requirements and adhere to the Institute's *Code of Professional Responsibility*. Investment & Wealth Institute (Institute) awards CPWA certification. Visit www.investmentsandwealth.org for more information.

The Investments & Wealth Institute is a professional association, advanced education provider, and standards body for financial advisors, investment consultants, and wealth managers who embrace excellence and ethics. Through our events, continuing education courses, and acclaimed certifications—Certified Investment Management Analyst® (CIMA®) and Certified Private Wealth Advisor® (CPWA®)—we deliver rigorous, highly practical education.