

PROFESSIONAL DEVELOPMENT PROGRAMS

Customized for your firm

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 professional development team is struggling to maintain an innovative training program that keeps up with today's issues and your firm is looking to supplement the training programs you have today, look no further!

We offer a variety of packages to help you and your employees maintain that leading-edge.

WHAT YOUR ADVISORS WILL RECEIVE:

- Ivy League-quality education and practical application
- Discover how to solve complex issues facing advisors today
- Gain new skills and techniques to tackle investor predicaments
- Successful strategies for driving revenue
- Learn practical application solutions for today's market challenges
- Get plugged into new networks of academics, industry experts, practitioners and researchers

WHAT YOU'LL GET:

- Recognition for being an employer vested in career development
- A reputation for having a strong culture of learning
- Course administration
- Discounted rates
- Access to an array of subject matter experts and leading industry disruptors
- Fresh and relevant content that reflect revolving subjects and topics that's on the minds of advisors

THE INSTITUTE OFFERS:

- Private certification classes for advisors seeking:
 - Certified Investment Management Analyst® (CIMA®) certification
 - Certified Private Wealth Advisor® (CPWA®) certification
 - Retirement Management Advisor® (RMA®) certification
- Certification designation group discounts (10+)
- Conference attendance discounts
- CE Bundles—podcast + quiz or traditional on-demand recordings. (5-20 Hours)
- Webinar attendance discounts
- Assessment-based certificate programs
- Association membership discounts

Visit us online at investmentsandwealth.org

If you're looking to create a game changer for your organization, contact our sales team.

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