

Certified Private Wealth Advisor[®] (CPWA[®])



Wealth
Management

In today's challenging financial and legal environment, it's important to choose a financial advisor with the skills to address your unique needs. The Certified Private Wealth Advisor[®] (CPWA[®]) certification is an advanced credential created specifically by Investment Management Consultants Association (IMCA) for wealth management advisors who work with high-net-worth individuals. And when you work with a CPWA, you've chosen someone who can help you manage your sophisticated estate, tax, and investment issues. You're also working with someone who has invested in their own education and adheres to an ethics code requiring them to serve your financial goals.

Knowledge and experience for your advanced needs

Advisors with the CPWA certification undergo a rigorous educational program focused on advanced wealth management topics, including:

- Tax planning
- Portfolio management
- Planning for executives and closely held business owners
- Risk management and asset protection

- Retirement planning using specialized retirement plans
- Advanced estate and charitable planning
- Family dynamics and legacy planning

Invested in your financial future

Advisors who have earned the CPWA credential have extensive experience in the financial services industry, have passed a background check, and have completed a demanding educational program ending with a week at the University of Chicago Booth School of Business and a comprehensive four-hour examination. To maintain their certification, CPWA professionals must adhere to a strict ethical code of professional responsibility and complete 40 hours of continuing education every two years.

Selecting the right wealth management professional

- **Credibility** — High-net-worth clients now seek IMCA's CPWA designation because they understand a basic wealth management background isn't enough to help them address their complex financial challenges.
- **Specialized knowledge** — CPWA certification provides expertise necessary to help guide the unique needs of high-net-worth clients.

- **Differentiation** — Credentials are often misunderstood, but the CPWA is among the most respected certifications.
- **Executive education** — CPWA-certified advisors regularly attend advanced education provided by IMCA and other professional organizations.
- **Ethics** — CPWA professionals must adhere to IMCA's Code of Professional Responsibility and enforcement of disciplinary violations is handled by a professional review committee of peers.