Accredited Wealth Manager Program

The Accredited Wealth Manager (AWM) Program provides a professional designation specifically designed for experienced Financial Advisors at RBC Wealth Management. This academic program builds on the fundamentals of Wealth Management with a focus on advanced knowledge of investment strategies, insurance, estate planning, charitable giving, business succession solutions, and retirement planning for high net worth clients.

RBC Wealth Management is partnering with the Academy of Multidisciplinary Practice, Inc. and the Estate & Wealth Strategies Institute at Michigan State University to design and deliver the cutting-edge AWM curriculum. The curriculum focuses on building skills to implement a multidisciplinary practice that includes advisors from several disciplines. In the estate and wealth strategies arena, this is a practice that includes a combination of legal, financial, accounting, and life insurance planning. The mission of this practice is to ensure that clients obtain the best planning from professionals who work together in a manner that promotes and protects the ethical standards of each profession.

ESTATE & WEALTH STRATEGIES INSTITUTE

As a non-profit organization, the Estate and Wealth Strategies Institute is the first of its kind dedicated solely to advanced strategies for wealth, estate, business, and charitable planning, and reflects the contributions of the finest of academia, business, and the estate planning profession. The Estate & Wealth Strategies Institute is part of the Academy of Multidisciplinary Practice at Michigan State University. The Academy of Multidisciplinary Practice educates and bestows credentials for estate and financial planning professionals in a completely multidisciplinary environment. The Estate & Wealth Strategies Institute is a joint initiative between Michigan State University, a national leader in virtual education, and Robert Esperti and Renno Peterson, with expertise in the fields of wealth, estate, and charitable planning for the highly affluent.

PRINCIPALS

Robert A. Esperti is a Co-founder and Co-Chancellor of The Academy of Multidisciplinary Practice, Inc. He is Co-founder, Chancellor and Dean of the Esperti, Peterson Institute for Wealth-Strategies Planning. Mr. Esperti is a partner in Esperti, Peterson & Cahoone, a National Law Firm & Partnership of Professional Corporations; Co-chair, Esperti Peterson & Cahoone Consulting, Inc., a firm providing individualized wealth strategies planning for high net worth families. Mr. Esperti is a member of the Michigan, Colorado, Wyoming, Texas, and Montana Bars. He attended Michigan State University and received a Bachelor of Arts, in 1964. He received his Juris Doctorate from Wayne State University in 1969. Mr. Esperti is the co-author of several texts and books for wealth management and tax professionals.

Renno L. Peterson is a Co-founder and Co-Chancellor of The Academy of Multidisciplinary Practice, Inc. He is Co-founder, Chancellor and Dean of the Esperti Peterson Institute for Wealth-Strategies Planning. Mr. Peterson is a partner in Esperti, Peterson & Cahoone, a National Law Firm and Partnership of Professional Corporations; Co-chair, Esperti, Peterson & Cahoone Consulting, Inc., a firm providing individualized wealth strategies planning for high net worth families. Mr. Peterson is the co-author of several texts and books for wealth management and tax professionals. Mr. Peterson is a member of the

Colorado and Florida Bars. He attended Colorado State University and received a B.S. in Business Administration, in 1970. He received his Juris Doctorate from University of Colorado in 1973.

David K. Cahoone is a partner in Esperti, Peterson & Cahoone; Member of the Esperti, Peterson & Cahoone Consulting, Inc; Owner and faculty member of the Advanced Wealth Studies Institute, LLC.; Faculty member of the Chartered Wealth Advisor (CWA) Program through The Academy of Multidisciplinary Practice. Mr. Cahoone is a member of the Florida and Sarasota County Bar Associations. He is the author of numerous publications and has been a radio/television on-air expert. Mr. Cahoone received his B.A. from Eckerd College in 1981 and his Juris Doctorate from Western New England School of Law in 1985. He received his Masters of Laws from Florida College of Law in 1986.

RBC Wealth Management does not provide tax or legal advice. All decisions regarding the tax or legal implications of investments should be made in connection with an independent tax or legal advisor.