INVESTMENTS & WEALTH INSTITUTE®

2025

PARTNERSHIP GUIDE

Investments & Wealth Institute 2025 Partnership Guide

Branding | Certification | Education | Foundation

Overview

Branding

Certification + Education

Foundation

Founded in 1985, the Investments & Wealth Institute is the premier professional association, education provider, and standards body for financial advisors. Through our award-winning events, publications, courses, and acclaimed certifications—Certified Investment Management Analyst® (CIMA®), Certified Private Wealth Advisor® (CPWA®), and Retirement Management Advisor® (RMA®)—the Institute delivers Ivy League-quality, highly practical education to more than 30,000 practitioners annually in 40 countries.

We are proud to deliver more than 100 educational programs each year, publish award-winning peer reviewed publications, and administer multiple assessment-based certificate programs and three advanced certification programs. With more than 18,000+ individual members, members of the Institute include the industry's most successful investment consultants, advanced financial planners, and private wealth advisors who embrace excellence and ethics in applying a broad set of knowledge and skills in their daily work with clients. In total, Institute members and certificants collectively manage $3.5 trillion in assets for 1.2 million individual and 20,000 institutional clients.

We would be honored to have you as an Institute partner or sponsor. As a partner or sponsor, you will receive various benefits and access to members of the premier professional association, education provider, and standards body for financial advisors. If you are interested in becoming a partner or sponsor, please contact us. We would love to set an appointment to discuss the levels and benefits that best meet your needs.

Thank you for your time and consideration. We look forward to hearing from you!

April Ferrell,
Managing Director, Global Business Development & Executive Director of the Foundation
+1 303-850-3093
aferrell@i-w.org

Lara Davies,
Director, Client Relationship Management
+1 303-850-3081 (Direct)
+1 720-838-3904 (Cell)
ldavies@i-w.org

Gray Bullard,
Business Development Manager
+1 (303) 529-3704
gbullard@i-w.org

INSTITUTE DEMOGRAPHICS

The Investments & Wealth Institute is a non-profit professional association, advanced education provider, and certification board for financial advisors, investment consultants, financial planners, and wealth managers who continuously strive for excellence and ethics.

Our mission is to deliver premier investment consulting and wealth management credentials: Certified Investment Management Analyst® (CIMA®), Certified Private Wealth Advisor® (CPWA®), Retirement Management Advisor® (RMA®), and world-class education.

CONFERENCES
Investments & Wealth Experience 2025
Strategy Forum
Focus Series: Tax + Estate Planning

3 CERTIFICATIONS
Certified Investment Management Analyst®
Certified Private Wealth Advisor®
Retirement Management Advisor®

7 CERTIFICATE COURSES
Applied Behavioral Finance
College & Student Loan Planning Essentials
Endowments & Foundation Consulting
Global Financial Planning
Investment Management Essentials
Private Markets for Advisors
Private Wealth Essentials

4 MICRO-COURSES
Advice & Planning
Explaining Blockchain and Digital Assets to Clients and Prospects
Social Security Planning
Taxation of Cryptocurrency and Digital Assets: Part 1 and Part 2

2 SHORT COURSES
Strategic Planning for Business Owners
Using BeFi to Build Trust and Manage Investor Behavior

AWARD-WINNING PUBLICATION
Investments & Wealth Review

21,000+
MEMBERS GLOBALLY

8,916
CIMA® Certificants

3,978+
CPWA® Certificants

356
RMA® Certificants

COLLECTIVELY MANAGE $3.5 TRILLION

Average AUM
$364 Million

ADVISORS REPRESENT ALL ADVISORY CHANNELS

WIREHOUSE: 35%
RIA: 26%
NATIONAL & REGIONAL: 14%
HYBRID RIA: 13%
IBD: 10%
RETAIL BANK: 1%
INSURANCE BD: 1%

GENERATIONAL DISTRIBUTION

(>71) SILENT GENERATION: 2.9%
(52-70) BABY BOOMERS: 52.1%
(36-51) GEN X: 35.5%
(<36) MILLENIAL: 9.5%

Branding Opportunities

- Partners
- Events
- Webinars
- Advertising
- Research

PARTNER PROGRAMS

ANNUAL PARTNERS

Unlock three exclusive partnership tiers—Platinum, Gold, and Silver—each strategically designed to amplify your brand's presence across high-value, targeted opportunities. Partners gain valuable access to influential leaders in the investment, retirement planning, and wealth management space, providing premier exposure at industry-defining events and platforms. Strengthen your market position, drive engagement with key decision-makers, and align your brand with the future of financial services..

If your annual spend reaches the thresholds below you will be an annual Partner of IWI with the following additional rights and benefits.

Platinum Invest $100,000 and receive additional benefits including:	**Gold** Invest $75,000 and receive additional benefits including:	**Silver** Invest $50,000 and receive additional benefits including:
• Company logo displayed on IWI homepage and partner page • Company logo in IWI digital newsletter • Thank You banner advertisement in IWI digital newsletter • Thank You advertisement in Investments & Wealth Review • One (1) social media post thanking IWI Platinum Partners • Top billing logo and verbal recognition at firm-sponsored IWI event(s) • Advertisement in Investments & Wealth Institute Podcast	• Company logo displayed on IWI homepage and partner page • Thank You banner advertisement in IWI digital newsletter • Thank You advertisement in Investments & Wealth Review • One (1) social media post thanking IWI Gold Partners • Elevated logo placement and verbal recognition at firm-sponsored IWI events	• Company logo displayed on IWI partner page • Thank You advertisement in Investments & Wealth Review • One (1) social media post thanking IWI Silver Partners • Elevated logo placement and verbal recognition at firm-sponsored IWI events

CELEBRATING 40 YEARS

INVESTMENTS & WEALTH INSTITUTE

EXPERIENCE

AUSTIN, TEXAS | JW MARRIOTT | MARCH 30 - APRIL 2, 2025

iwicentral.org/EXP25

About the Investments & Wealth Experience

Experience 2025 is the Investments & Wealth Institute's largest in-person event of the year. The conference will focus on the latest trends and insights in investment, wealth, retirement planning and management. Advisors in attendance will be looking for new strategies, techniques, and knowledge to increase their success, build the strength of their practices, and better serve their clients.

Since 1985, the Investments & Wealth Institute has served as a 501(c)6 non-profit membership society, education provider, and standards body for the financial advice profession.

Expected Advisor Attendees by Firm

WIREHOUSE: 35%

RIA: 26%

NATIONAL & REGIONAL: 14%

HYBRID RIA: 13%

IBD: 10%

RETAIL BANK: 1%

INSURANCE BD: 1%

EXPECTED ATTENDANCE
600+

EXPECTED ADVISOR AVERAGE AUM
$364 Million

Sponsors

- **Solo Super Session: $48,000**
  60-minute speaking opportunity, 3 sessions running concurrently
- **Solo Breakout Session: $40,000**
  60-minute speaking opportunity, 4 sessions running concurrently
- **Pre-Conference Session: $38,000**
  120-minute speaking opportunity, 2 sessions running concurrently
- **Ed Talk Session: $25,000**
  25-minute speaking opportunity during lunch and/or breaks
- **Women in Wealth Session: $25,000**
  60-minute panel speaking opportunity at luncheon
- **Panel Breakout Session: $22,500**
  60-minute panel speaking opportunity, 4 sessions running concurrently

Exhibitors

- Exhibitor: $15,000

Social

- Sponsored Reception Entertainment: $20,000
- Next-Generation Reception: $20,000
- Premium Lounge: $10,000
- Sponsored Reception: $10,000

Food + Beverage

- Elevated Coffee Station: $15,000
- Lunch: $7,500
- Breakfast: $7,500
- Break Station: $7,500
- All-Day Beverage Station: $5,000

Giveaways + Services

These elevated opportunities are only available for Sponsors and Exhibitors

- Lanyards: $10,000
- Room Drop: $10,000
- Key Card Packets: $10,000
- Wifi Splash Page: $5,000

For more information, please contact:

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INVESTMENTS & WEALTH INSTITUTE®

INVESTMENTS & WEALTH STRATEGY FORUM 2025

NEW YORK MARRIOTT MARQUIS, TIMES SQUARE

November 16 - 18, 2025

Position your brand at the forefront of wealth management innovation by sponsoring the Investments & Wealth Strategy Forum 2025. This exclusive event is designed for seasoned professionals looking to stay ahead in an ever-evolving landscape. By aligning your brand with this premier gathering, you'll connect with top-tier wealth and investment managers seeking cutting-edge insights in investment, wealth management, and retirement education.

We offer a wide range of sponsorship opportunities tailored to maximize your brand's visibility, from keynote presentations and breakout sessions to networking events and exhibition space. Showcase your solutions as industry leaders explore advanced strategies to grow both their clients' portfolios and their own businesses. Don't miss this chance to position your brand at the forefront of financial innovation and thought leadership.

Expected Attendence: 350

Advisor Attendee

Average AUM
$364 Million

WIREHOUSE: 35%
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RETAIL BANK: 1%
INSURANCE BD: 1%

Presenting Sponsors

- Pre-conference: $35,000
- Solo breakout session: $30,000
- Panel breakout session: $20,000
- Women in wealth luncheon: $15,000
- Meet the manager: $5,000

Exhibitors

- Exhibitor: $10,000
- Fintech: $7,000

Social + Food/Beverage

- Sponsored reception: $10,000
- Sponsored breakfast: $7,500
- Sponsored lunch: $7,500

Giveaways + Services

- Key card packets: $10,000
- Wifi splash page: $5,000

For sponsorships, please contact:

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303-850-3081

FOCUS

Advanced Portfolio Construction Balancing Income, Alternatives, + Taxes

Boston, MA - June 2025 | Los Angeles, CA - September 2025

About the Focus Series

Investments & Wealth Institute is hosting an exclusive, one-day event for leading practitioners in financial services. Join us in empowering advisors to deliver exceptional value to their clients on critical topics such as investments, alternatives, and tax strategies.

Engage directly with a select group of decision-makers who are actively seeking innovative solutions to enhance their client offerings.

Presenting Sponsor - $35k

2 cities - $30k/event | 1 city - $35k/event

- Speaking opportunity–speakers receive complimentary registrations. Only one sponsor per topic at each event.
- Table-top at event.
- 2 complimentary registrations.
- 10 complimentary passes for each sponsor to invite your best clients from the area.
- Round Table in meeting room with stanchions.
- Attendee list for each sponsored city.
- Logo on table stanchion on round table in meeting room.
- Logo on website and promotions for the event.

Expected Advisor Attendees by Firm

WIREHOUSE: 35%

RIA: 26%

NATIONAL & REGIONAL: 14%

HYBRID RIA: 13%

IBD: 10%

RETAIL BANK: 1%

INSURANCE BD: 1%

EXPECTED ATTENDANCE
125 per city

EXPECTED ADVISOR AVERAGE AUM
$364 Million

Breakfast or Reception Sponsor - $10k

- Table-top at event.
- 2 complimentary registrations.
- 5 complimentary passes to invite your best clients from the area.
- Round Table in meeting room with stanchions.
- Attendee list.
- Firm name on table stanchion on round table in meeting room.
- Signage with logo as breakfast or reception sponsor.
- Firm name on website and promotions for the event.

Exhibitor - $5k

- Table-top at event.
- 2 complimentary registrations.
- 5 complimentary passes to invite your best clients from the area.
- Round Table in meeting room with stanchions.
- Attendee list.
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- Firm name on website and promotions for the event.

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Webinars, Advertising & Research

INVESTMENTS & WEALTH INSTITUTE®

WEBINARS

Create engagement with advanced advisors and align your brand with timely and relevant content. The Institute provides all the resources needed to deliver quality content, turn-key marketing, and approval and delivery of continuing education (CE) to participants. Position your firm as an industry thought leader on your own topic, or a variety of suggested topics including:

- Tax Planning
- Portfolio Construction with ETFs
- Portfolio Hedging
- Global Macroeconomic Outlook
- Delivering Wealth Management to Families
- Behavioral Finance
- Procedural Prudence
- Discovery Conversations with Clients
- Role of Structured Products in a Portfolio
- Private Equity Landscape
- Liquid Alternatives
- And more!

Use your subject matter experts, or let us help provide one.

- Each Webinar is 60 minutes (50-min. presentation with 10 min. Q & A). One hour of CE credit available to participants for no cost. Registration is free.
- Institute will handle all CE reporting (pending CE approval).
- Approximately 200-400 advanced practitioners register for each webinar.
- Institute handles all promotion, marketing, and registration activities.
- Institute will provide you creative assets for you to send to your clients and prospects.
- Webinars may be archived on our learning management system for 12 months.

Solo Sponsored Webinar - $12,000
Panel Sponsored Webinar - $8,000

LEARN MORE:

21,000+ MEMBERS GLOBALLY

8,916 CIMA® Certificants

3,978+ CPWA® Certificants

356 RMA® Certificants

COLLECTIVELY MANAGE $3.5 TRILLION

Average AUM **$364 Million**

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(36-51) GEN X: 35.5%
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INVESTMENTS & WEALTH INSTITUTE®

PUBLICATIONS & ADVERTISING

INVESTMENTS & WEALTH REVIEW

Published bimonthly (six issues per year) *Investments & Wealth Review* ranks among the most valued benefits for Institute members. Each issue reaches our entire member base of elite investment and wealth management professionals. *Investments & Wealth Review* offers you one of the best ad-to-editorial ratios in the industry, as well as an uncompromised, 100% peer-reviewed editorial environment.

INVESTMENTS & WEALTH RESEARCH

Published up to six times per year as a section within *Investments & Wealth Review*, *Investments & Wealth Research* provides custom research describing demographic and best practice information about Institute members and how they deliver investment consulting and wealth management services. As an exclusive member benefit, *Investments & Wealth Research* is distributed to the Institute's membership. Our research is published in partnership with leading industry research firms like Cerulli Associates and Absolute Engagement.

GENERAL REQUIREMENTS:
Only full-page ads accepted
Binding Method: Perfect
Printing Process: CMYK

BLEED AD SIZES:
Trim size: 8.375 x 10.875"
Bleed size: 8.625 x 11.125"
Live area: 7.875 x 10.375" (outside back cover)
7.375 x 10.375" (inside pages)

LEARN MORE:

Issue Date	Topic
January/February 2025	Understanding the Advice Industry
March/April 2025	Tax Matters: The Tax Issue
May/June 2025	Family Wealth Best Practices
July/August 2025	The Portfolio and Your Practice
September/ October 2025	Reprogramming Retirement/ Deciphering the Government Benefit Blueprint
November/December 2025	The Aspirational Advisor

PRINT EDITION: FULL-PAGE, FOUR COLOR RATES (NET)	PRICE X1	PRICE X2	PRICE X3
Run of Book	$5,000	$4,250	$3,500
Inside Front Cover	$7,500	$6,375	$5,250
Back Cover	$7,500	$6,375	$5,250
Inside Front Cover Spread	$12,000	$10,200	$8,400
Note: All rates are net. Covers and premium positions are non-cancellable.			

PRODUCTION PERSONNEL
Debbie Nochlin
+1 303-898-6152
dnochlin@i-w.org
Email Submission Preferred

RESEARCH SPONSORSHIP

RESEARCH SPONSORSHIP SURVEY AND DISTRIBUTION BENEFITS - $150,000+

Sponsor will engage IWI to work with third-party research firm on a joint project related to the publication of a comprehensive research project and white paper on a mutually agreed upon topic.

- Working with the research firm, IWI will distribute an advisor survey to their financial advisor members, targeting a mutually agreed upon sample size
- IWI will print the research prepared by research firm in an addendum of the *Investments & Wealth Review* member magazine distributed to over 18,000 members. The addendum will include a four-color/full-page advertisement included in that issue of the *Investments & Wealth Review*
- The Institute will partner with research firm and the sponsor to develop an appropriate media strategy including a joint press release, messaging related to key findings, identifying target publications and reporters, and executing outreach
- IWI will promote the research on IWI website, in IWI social media, and in IWI newsletters
- Opportunity to sponsor webinars and conferences to present the findings to IWI members at an additional cost

RESEARCH SPONSORSHIP DISTRIBUTION ONLY BENEFITS - $50,000

- IWI will print sponsor's research in an addendum of the *Investments & Wealth Review* member magazine distributed to over 18,000 IWI members. The addendum will include a four-color/full-page advertisement included in that issue of the *Investments & Wealth Review*
- IWI will promote the research via a press release, on IWI website, in IWI social media, and in IWI newsletters
- Opportunity to sponsor webinars and conferences to present the findings to IWI members at an additional cost

Certifications & Education

Certified Investment Management Analyst® (CIMA®) Certification

The peak global certification for investment management and portfolio construction

INVESTMENTS & WEALTH INSTITUTE®

The Certified Investment Management Analyst® (CIMA®) designation is a professional certification for financial advisors and investment consultants in advanced portfolio construction. The program requires completing a sophisticated investment curriculum to help you meet the real-world needs of individual and institutional investors. Additionally, CIMA executive education is taught exclusively at some of the world's most prestigious business schools.

Typical Time Commitment: 9 months

Minimum Work Experience Requirement: 3 years (financial)

Accreditation: ANAB

Adherence to Code of Ethics/Standards: Yes

CIMA Comprehensive Exam Overview

Exam Percentage	Exam Domains	Exam Sections
15%	Fundamentals	Statistics and Methods, Applied Finance and Economics, Global Capital Markets
25%	Investments	Investment Vehicles, Equity, Fixed Income, Alternative investments, Options, Futures and Other Derivatives, Real Assets
25%	Behavioral Finance, Portfolio Theory and Construction	Portfolio Theories and Asset Pricing Models, Behavioral Finance Theory, Investment Philosophies and Styles, Portfolio Construction
10%	Performance Analysis	Risk Concepts and Measurement, Performance Measurement and Attribution
25%	Portfolio Implementation and Consulting Process	IWI Code of Professional Responsibility, Client Discovery and Investment Policy Statements, Investment Implementation Approaches, Manager Search, Selection, and Monitoring, Portfolio Review and Revisions

Who should earn the CIMA certification?
Investment consultants, investment advisors, financial planners, wealth management professionals, investment analysts, 401(k) plan consultants, OCIO, and asset management professionals

Why earn the CIMA certification?
Upon completion of the CIMA program, practitioners are better equipped to consult with clients and direct their investment portfolios than average advisors.

Build client confidence
Achieving CIMA certification gives clients confidence that you have the sophisticated knowledge and expertise to provide sound advice as their needs and circumstances become increasingly complex.

Grow your business and open doors
Institutions, high-net-worth individuals, and small business owners are particularly demanding when it comes to the qualifications of their advisors. The advanced investment management knowledge and skills required for CIMA certification can get their attention and satisfy their expectations.

Attain higher compensation
Compared to other financial advisors, CIMA holders report earning more and have nearly three times more assets per client. Practices with at least one CIMA professional have been shown to earn more than practices without one.

Private classes and group registration packages available on request.

CHICAGO BOOTH
The University of Chicago Booth School of Business

Yale SCHOOL OF MANAGEMENT
Executive Education

Learn more about the CIMA certification at:
https://iwicentral.org/cima

CERTIFIED PRIVATE WEALTH ADVISOR® (CPWA®) CERTIFICATION PROGRAM

Serving high-net-worth advisors and their clients

INVESTMENTS & WEALTH INSTITUTE®

The Certified Private Wealth Advisor® (CPWA®) certification is designed for advisors who seek the latest, most advanced knowledge and techniques to address the sophisticated needs of high-net-worth clients. By participating, advisors learn to identify and analyze challenges high-net-worth families and individuals face and understand how to develop specific strategies to minimize taxes, monetize and protect assets, maximize growth, and transfer wealth. The program takes a holistic, multidisciplinary approach and focuses on the full cycle of wealth: accumulation, preservation, and distribution.

Typical Time Commitment: 6 months

Minimum Work Experience Requirement: 5 years (financial)

Accreditation: ANAB

Adherence to Code of Ethics/Standards: Yes

CPWA Comprehensive Exam Overview

Exam Percentage	Topics
13%	**Human Dynamics** Ethics, Behavioral Finance, Family Dynamics
34%	**Wealth Management Technical Design** Tax Planning, Portfolio Management, Risk Management, Asset Protection
23%	**Legacy Issues** Charitable Giving and Endowments, Estate Issues, Wealth Transfer
30%	**Specialty Client Services** Planning for Executives, Planning for Closely Held Business Owners, Retirement Management

Who should earn the CPWA certification?
Wealth management advisors, financial planners, private banking and trust, investment consultants, family office advisors, tax advisors, estate planning specialists

Expert Instruction
The CPWA curriculum is taught by preeminent academic and practitioner faculty. All instructors are subject matter experts in their respective fields. This provides a mix of Ivy League-quality education and practical application.

Why earn the CPWA certification?
Today's affluent investors demand more from their financial advisor. These clients have more complex financial needs and are looking for broad knowledge to help them continue to grow their wealth and preserve it. In order to stay relevant and serve these complex needs, advisors need to broaden their base of knowledge for themselves and for their team.

Specialized expertise and skills
The explosion in global wealth in recent years has resulted in more high-net-worth clients than ever. In addition, the needs of these clients are increasingly complex. CPWA certification gives advisors the specific expertise and skills needed to confidently advise these clients and provide the high level of customer service they expect and demand.

Differentiation through credibility
In the highly competitive field of wealth management, clients are very selective in choosing advisors. CPWA certification gives advisors the edge they need to stand out. In addition to gaining rigorous wealth management knowledge, being a CPWA certification holder means you are adhering to the highest ethical standards to best serve your clients.

Higher compensation
Educated advisors manage more assets, generate more revenue, and attract a larger share of investable assets. Learning more means earning more. Through the CPWA certification advisors become more knowledgeable, confident, and competent to serve their clients.

PRICING
2025 Open Enrollment Rate for Yale and Booth: $6,995-$7,295
Private classes and group registration packages available on request.

CHICAGO BOOTH
The University of Chicago Booth School of Business

Yale SCHOOL OF MANAGEMENT
Executive Education

Learn more about the CPWA certification at https://iwicentral.org/cpwa

RETIREMENT MANAGEMENT ADVISOR® (RMA®) CERTIFICATION

The retirement certification that makes a difference to your clients

INVESTMENTS & WEALTH INSTITUTE®

The Retirement Management Advisor® (RMA®) 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 an ever-changing regulatory environment.

Typical Time Commitment: 4-6 months

Minimum Work Experience Requirement: 3 years (financial)

Adherence to Code of Ethics/Standards: Yes

RMA Comprehensive Exam Overview

Topic	Details Covered
The Retirement Opportunity	The Retirement Landscape Retirement Mindset and Behavior The Ethical Advisor
The Retirement Client	Client Discovery and Analysis Assessing Retirement Readiness Retirement Risk Management
Retirement Technical Design	Retirement Portfolio Allocations Key Retirement Planning Decisions Implementations Strategies Life in Transition Retirement Policy Statements

Who should earn the RMA certification?
Wealth managers and specialists, financial planners and advisors, investment consultants and advisors, retirement specialists, family-office professionals, trust professionals, tax and estate professionals.

Multidisciplinary approach to retirement planning
The RMA program maps a complete framework of the retirement planning universe. By evaluating several schools of thought, particularly on retirement allocation strategies and risk management techniques, advisors can adopt all best practices.

Why earn the RMA certification?
Now more than ever, advisors need to deliver specialized expertise and skills to acquire and retain all types of clients. RMA's curriculum teaches specialized retirement strategies and techniques that are highly practical to help advisors distinguish themselves from the average advisor.

Strategies for custom risk assessment and unbiased solutions
The RMA program is 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.

Practical tools and techniques to use in your practice
Starting with the Procedural Prudence Map, the RMA program provides practical tools that help advisors map a decision-making process that complies with fiduciary best practices. Using the Client Diagnostic Kit helps set the stage for initial client data gathering while the RMA Toolbox compiles the various strategies into actionable client product recommendations.

Better understand your clients' retirement mindset
Using a combination of behavioral finance, industry research, and practitioner experience, the RMA program helps advisors better understand their clients' mindset at retirement, as they shift from accumulating and investing assets to funding retirement income.

Private classes and group registration packages available on request.

CHICAGO BOOTH
The University of Chicago Booth School of Business

Learn more about the RMA certification at www.investmentsandwealth.org/RMA.

IWI ACADEMY OFFERINGS

WHITE LABEL IWI ACADEMY — PRICE TBD

The IWI Academy offers a customized education experience, delivering a seamless, white-label educational experience that's fully integrated into your firm's ecosystem. Elevate your team by providing high-quality, custom-branded training that reflects your expertise and commitment to excellence.

- Custom learning path
- Advanced administrative permissions
- Firm logo placed throughout Academy
- Custom navigation
- Potential for firms' education content Academy platform
- Learner technical support
- Orientation materials provided for your administrators and team

ENTERPRISE SUBSCRIPTION TO IWI ACADEMY — $995

On-demand education with data-driven insights. Track employee progress and create a streamlined education path for your advisory teams. Let us do the work – rely on IWI for relevant and timely content from our industry leading experts and get real-time insights into how your teams are progressing with over 200+ hours of on-demand education.

- Annual subscription to IWI Academy with unlimited access to online library
- Administrative access to closely monitor the progress of your team
- Orientation call with IWI Education Team
- Recorded orientation video for users and FAQs

GROUP COURSE — $795

Equip your team with the latest tools, insights, and strategies through IWI's Academy courses. Ranging from 15-hours to 1-hour, IWI has a vast library of education to support your teams.

- Access to selected IWI Academy course
- Administrative access to closely monitor the progress of your team
- Orientation call with IWI Education Team
- Orientation materials provided for your administrators and team

Investments & Wealth Foundation

INVESTMENTS & WEALTH FOUNDATION

The Investments & Wealth Foundation provides scholarships for underrepresented professionals to pursue CIMA®, CPWA®, and RMA® certifications. With your support the Foundation will reduce the financial barrier to certification through scholarship.

The Investments & Wealth Foundation scholarship program enables women, diverse professionals, and next-generation leaders to elevate their careers and contribute to our profession. Corporate investment in the future of a diverse and representative financial advisor profession is vital to the future of the profession.

Your donation supports scholarship assistance to pursue CIMA®, CPWA®, and RMA® certifications for:

- Women
- Black, Indigenous, and People of Color
- Veterans
- Those who identify under the LGBTQ+ umbrella
- Advisors from small, independent RIA or independent broker-dealer firms who don't provide tuition reimbursement assistance

in 2023, the Institute awarded more than $1.4 million in scholarship assistance to 774 professionals seeking CIMA®, CPWA®, and/or RMA® certification.

As a result of funding scholarships in the last four years, the percentage of certification applications from BIPOC applicants increased 112% and we saw an increase of 12% from independent channels. We are moving the needle and will continue to do so because of the support of our sponsors, partners, and donors.

Chitra Patel, CPWA®, CFP®, MBA
CPWA® Certificant

"The Investments & Wealth Institute Foundation is a great organization and sees the value in supporting minority advisors wanting to grow and make an impact on the industry and their clients."

MISSION

Accelerate career advancement of target professionals who are currently underrepresented in the profession, thereby fostering sustainable diversity within the financial advisor profession.

GOAL

To grow and support a more diverse workforce within the financial advisor profession through scholarship.

INVESTMENTS & WEALTH FOUNDATION SCHOLARSHIP DONOR - $25,000+

- Sponsor recognition on the IWI website
- Sponsor recognition on conference loops during Experience 2024
- Thank-you ad in the *Investments & Wealth Review*
- Recognition in the Foundation Annual Report

Contact April Ferrell, Director of the Investments & Wealth Foundation, at aferrell@i-w.org or +1 303-850-3093 for more information about corporate donations to the Investments & Wealth Foundation.

LEARN MORE:

INVESTMENTS & WEALTH INSTITUTE®

iwicentral.org/home