CPWA® Certificant Guidebook
to Amplifying Your Brand in the Marketplace

Helpful tools and resources to communicating your value to others
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Client Announcement:

[Client Salutation]:

Suggested personal statement of reference here, such as: I enjoyed seeing you recently at my office, I hope you have enjoyed our quarterly newsletter, etc., before transitioning into information on CPWA certification brochure.

As you may recall, I am a Certified Private Wealth Advisor® (CPWA®) professional. The CPWA certification is an advanced professional education and certification program for advisors who serve high-net-worth clients.

Recently, the standards and education organization that oversees my certification changed their name, from the Investment Management Consultants Association® (IMCA®) to the Investments & Wealth Institute®. They have recently released updated information on the CPWA certification and so I thought now would also be an appropriate time to update you, my valued clients, on what it means to you to have a CPWA® certified financial advisor.

I urge you to review this information (Optional attachment or link) [CPWA Client One-Pager](#) or [CPWA Client Brochure](#) which outlines what the CPWA certification is and what it takes to earn the certification, including the four “E’s”: education, ethics, experience, exam. What I would like to highlight to you is the Continued Competency aspect of my CPWA certification and my professional practice in general. Not only do I fulfill forty hours of continuing education credit hours necessary for my CPWA certification, but I also maintain (fill in additional certifications, designations, insurance, and/or securities licenses etc which may require even more education hours).

It’s important to me as your advisor that you know the time and commitment that is dedicated to keeping abreast of the latest trends, strategies, and laws so that I can serve you with the most sophisticated wealth management knowledge possible.

I welcome any questions you may have about my professional certifications like CPWA. If you would like to learn more about the international organization behind the certification, visit the website of the Investments & Wealth Institute [https://investmentandwealth.org](https://investmentandwealth.org), or for investor resources, [https://investmenthelp.org/](https://investmenthelp.org/).

Finish with personalized statement, such as “I look forward to seeing you at our next quarterly meeting”
Prospect Letter

[Prospect Salutation]:

Suggested personal statement of reference here, such as: I enjoyed seeing you recently at my office, I was referred to you by Mr/Mrs. Client, etc., before transitioning into information on CPWA certification.

In your search for a financial advisor, you might be wondering what the difference is between advisors and what all the initials at the end of their names mean. If you are interested, here is a handy reference to most of the financial service industry designations compiled by FINRA, a licensing and regulatory body. As you can see, there are many designations and many differences in the education and experience needed to obtain each one.

What makes me different? I am a Certified Private Wealth Advisor® (CPWA®) professional. The CPWA certification is an advanced professional education and certification program for advisors who serve high-net worth clients.

As a CPWA professional, I have taken the time, expense, and commitment to advance my wealth management knowledge, including specific tax and estate planning strategies, so that I can better serve my clients. I have invested in executive education at a graduate level, instructed by ivy-league quality instructors, who have guided my education in both theory and practical application.

What does all this mean to you? It means that I am able to perform a holistic, deep-dive analysis of your situation to make sure that you receive the specialized expertise and skills necessary for the high net worth client. And because continuing education is a requirement of the CPWA certification program, I stay abreast of the latest trends, strategies, and laws so that I can serve you with the most sophisticated wealth management knowledge possible.

I urge you to review this information (Optional attachment or link) CPWA Client One-Pager or CPWA Client Brochure, which outlines what the CPWA certification is and what it takes to earn the certification, including the four “E’s”: education, ethics, experience, exam.

I welcome any questions you may have about my professional CPWA certification. If you would like more information about the international organization behind the certification, visit the website of the Investments & Wealth Institute https://investmentandwealth.org, or for investor resources, https://investmenthelp.org/.

Finish with personalized statement, such as “I look forward to seeing you at our next quarterly meeting”
Press Release

Customize this press release template to alert media, clients, and business partners that you earned the CPWA certification. 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®), Certified Private Wealth Advisor® (CPWA®) and Retirement Management Advisor® (RMA®)—we deliver rigorous, highly practical education.

INVESTMENTS & WEALTH INSTITUTE® is a registered mark of Investment Management Consultants Association Inc. doing business as Investments & Wealth Institute. CIMA®, CERTIFIED INVESTMENT MANAGEMENT ANALYST®, CIMC®, CPWA®, and CERTIFIED PRIVATE WEALTH ADVISOR® are registered certification marks of Investment Management Consultants Association Inc. doing business as Investments & Wealth Institute. RMA® and RETIREMENT MANAGEMENT ADVISOR® are marks owned by Investment Management Consultants Association Inc. doing business as Investments & Wealth Institute.
I am a Certified Private Wealth Advisor® (CPWA®) professional. The CPWA certification is an advanced professional education and certification program for advisors who serve high-net-worth clients.

Recently, the standards and education organization that oversees my certification changed their name, from the Investment Management Consultants Association® (IMCA®) to the Investments & Wealth Institute®.

Please review this [brochure](#) for an outline of what the CPWA certification is and what it takes to earn certification, including the four “E’s”: education, ethics, experience, exam.

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For CPWA certificants only. Display the CPWA logo on your website. Right-click the image and save it to your computer for use on your website.

What is a CPWA® Flyer

Here is an example of a flyer you can print and use to display in your office and add to client and prospect materials. If your firm requires compliance department approvals, be sure to check in with your firm’s compliance officer before sharing with others. Click here to print.

CPWA® Overview Brochure

This visually engaging resource can be used with your clients to discuss your qualifications as a CPWA® professional. If your firm requires compliance department approvals, be sure to check in with your firm’s compliance officer before sharing with others. Click here to print or click here to order. FINRA Reviewed