

<COMPANY LETTERHEAD>

FOR RELEASE: <DATE>

CONTACT: <NAME>
<TITLE>
<PHONE>
<E-MAIL>

Local Financial Professional Earns Investment Management Consultants Association's Applied Behavioral Finance Certificate

<CITY, STATE>...<DATE>...<FIRST AND LAST NAME, DESIGNATIONS> of <COMPANY NAME> in <CITY> enhanced <HIS/HER> industry knowledge online by completing the Investment Management Consultants Association® (IMCA®) Applied Behavioral Finance Certificate Program. Designed to address common behavioral challenges that trip up investors and advisors alike, IMCA's program features notable experts from leading business schools and presents in-depth, thoughtful, and interesting research from the field today. The program includes timely and relevant presentations by behavioral finance experts, financial advisor practitioners, and cutting-edge academics. Throughout the course, <MR./MS. LAST NAME> studied insightful analysis from a wide range of expert speakers, including:

- **Dan Ariely, PhD** | James B. Duke Professor of Behavioral Economics at Duke University, founding member of the Center for Advanced Hindsight, and the author of *New York Times* bestsellers *Predictably Irrational* and *The Upside of Irrationality*.
- **Andrew W. Lo, PhD** | Charles E. and Susan T. Harris Professor of Finance at the MIT Sloan School of Management and director of MIT's Laboratory for Financial Engineering.
- **Tobias Moskowitz, PhD** | Professor at the University of Chicago Booth School of Business and winner of the 2007 American Finance Association Fischer Black Prize, awarded to a leading finance scholar under the age of 40.
- **Meir Statman, PhD** | Glenn Klimek Professor of Finance at the Leavey School of Business, Santa Clara University, and author of the book *What Investors Really Want*.
- **Courtney Pullen** | Senior consultant at Boulder-based Conversant Solutions Inc. and contributing editor to the *Journal of Financial Planning*.
- **Carl Richards, CFP®** | CERTIFIED FINANCIAL PLANNER™, director of investor education for the BAM ALLIANCE (a community of more than 130 independent wealth management firms throughout the United States), creator of the weekly Sketch Guy column in the *New York Times*, and columnist for *Morningstar Advisor*.

Understanding that we are subject to the forces of behavioral finance, IMCA's Applied Behavioral Finance Certificate Program offers actionable strategies and tactics advisors can use to enhance client relationships. The program content covers:

- Core education on the differences between standard finance and behavioral finance and the role of human behavior in economic markets.
- Principles of behavioral finance, including the psychology of money, thinking styles, and psychological evidence on behavior.
- Behavioral finance and investing, with content focused on loss aversion and different strategies for evaluating and analyzing alternative investments.
- Practical advice about communicating with clients in light of behavioral finance, with subtopics focused on the role of the financial advisor, risk tolerance, and unconscious beliefs about money that investors habitually apply without thinking twice.

<INSERT PERSONAL QUOTE ABOUT THE EDUCATIONAL VALUE OF ATTENDING THE CERTIFICATE PROGRAM>
<INSERT BIOGRAPHICAL INFORMATION HERE>

Visit www.IMCA.org for more information.

About IMCA

Established in 1985, Investment Management Consultants Association® (IMCA®) is a nonprofit professional association and credentialing organization with more than 10,000 individual members and certificants worldwide. IMCA members collectively manage more than \$2.477 trillion, providing investment consulting and wealth management services to individual and institutional clients. Since 1988, IMCA has offered the Certified Investment Management Analyst® (CIMA®) certification, which earned accreditation by the American National Standards Institute (ANSI) in April 2011, making it the first financial services credential in the United States to meet international standards (ISO 17024) for personnel certification. IMCA's Certified Private Wealth Advisor® (CPWA®) certification is suited for wealth management professionals working with high-net-worth clients. In 2015, IMCA conferences and workshops hosted more than 4,000 attendees.

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