

WHY HIRE A CFA[®] CHARTERHOLDER TO MANAGE YOUR WEALTH?

Your wealth manager should be on the leading edge of every facet of your financial life, anticipating your needs and helping you create an investment strategy to achieve your goals.

CFA charterholders blend intellectual curiosity and expertise to deliver premium advice. They are the difference you need. Here's why:

Rigor and Expertise.

Fewer than 1 in 5 candidates becomes a CFA charterholder. It takes an average of over 1,000 hours of rigorous study, along with four years of professional experience, to earn the distinction of being called a Chartered Financial Analyst[®] (CFA) charterholder.

Holistic Wealth Management.

CFA charterholders are trained to understand what drives value in all dimensions of your financial life. They have mastered more than just the art and science of securities analysis and asset allocation. They also have expert-level portfolio management skills and the ability to work effectively with tax and intergenerational wealth planning experts to design an investment strategy specific to your objectives.

Your Interests Come First.

CFA charterholders recognize that trust is key to building a strong client-adviser relationship and are bound by the highest ethical standards — the CFA Institute Code of Ethics and Standards of Professional Conduct.



**IN A COMPLICATED
WORLD, HAVING A
CFA CHARTERHOLDER
ON YOUR SIDE WHO
IS CONFIDENT, READY
FOR TOMORROW, AND
COMPLETELY COMMITTED
TO YOUR INTERESTS IS
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THAT MATTERS™.**
