

SAMPLE PRESS RELEASE

FOR IMMEDIATE RELEASE

DATE: *MM/DD/YY*

CONTACT: *Your Name*
(303) XXX-XXXX

Your City—The College for Financial Planning[®], located in Denver, is pleased to announce that *Your Name*, of *Your City, Your State*, has successfully completed the ACCREDITED WEALTH MANAGEMENT ADVISORSM or AWMA[®] Professional Designation Program. Individuals who complete the program, pass a final exam, and sign a code of ethics and disclosure form can earn the right to use the AWMA[®] mark.

“EXAMPLE”

Your Name is the vice president of XYZ Corporation. Additionally, he/she is licensed by the National Association of Securities Dealers (NASD) and serves on the Board of Directors for the ABC Foundation. Your Name is also a member of the Financial Planning Association (FPA).

Developed in response to the need for advanced training within investment firms, the ACCREDITED WEALTH MANAGEMENT ADVISORSM Professional Designation Program offers investment professionals with the precise, hands-on information needed to provide ample, planning-oriented wealth management advice. The program provides immediately applicable information for busy investment professionals. Study topics include understanding the wealth management process, recognizing the best investment solutions for clients, considering investments in terms of risk and return, understanding asset allocation and strategies, and considering the special planning needs of high-net-worth clients and small-business owners. Several modules focus on how investment needs relate to the broader areas of insurance, taxation, estate planning, and retirement issues. Regulation and ethics for the investment professional also are addressed.

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