NEWS – FOR IMMEDIATE RELEASE

Contact:

Marie Swift
Impact Communications
marieswift@impactcommunications.org
913-649-5009

Cindy Chaifetz
Investments & Wealth Institute
cchaifetz@i-w.org
303-850-3079

Investments & Wealth Institute Announces 2021 Investment Advisor Forum and Women in Wealth Event

Virtual conference will focus on the evolution of investment management + there's a special closing segment for women who work in the profession, with a focus on ESG

DENVER – November 17, 2021 – The Investments & Wealth Institute (IWI), the premier professional association, education provider, and standards body for financial advisors, today announced details for their December 7 and 8, 2021 virtual conference, the Investment Advisors Forum (IAF), as well as information related to a special Women in Wealth segment on December 8th.

"The most successful investment advisors seek opportunities to question what they know, reevaluate their opinions, and rethink their systems to adapt," said the Institute's CEO Sean Walters, CAE®. "That's why this conference will focus on the evolution of investment management. The financial industry, like everything else, has been defined by change over the past 18 months. These changes are occurring due to data, technology, investor preferences, product features, and much more. It is essential to distinguish between core truths that will persist and traditional practices that may not endure. The conference, featuring an impressive line-up of industry heavy weights, political experts, and Ivy League academics, will address changes in the industry and ramifications for the future, providing real world applications for those who attend."

TRENDS IN ESG AND IMPACT INVESTING

The two-day live-streamed event, which is themed around the Evolution of Investment Management, will close with a special session: Women in Wealth: Current Trends within ESG and Impact Investing (1 credit hour). Sponsored by Cambridge, this one-hour session, is free and open to everyone, whether or not they have paid the fee to attend the conference itself. Speakers for this special one-hour session include:

- Tammy Robbins, EVP and Chief Business Development Officer, Cambridge Investment Research, Inc.
- Lily Trager, Managing Director and Head of Investing with Impact, Morgan Stanley
- Michelle Begina, CFP®, CIMA®, RICP®, Senior Partner, Managing Director, Snowden Lane Partners

CONFERENCE AGENDA PUTS ACADEMICS AT THE CORE

Attendees will gain academic insights and will obtain new skills and techniques for today's investor challenges. Speakers include:

- Corey Ciocchetti, JD – Associate Professor Business Ethics, Daniel College of Business, University of Denver (topic – Inspire Integrity)
- Richard Marston, PhD – Professor Emeritus, The University of Pennsylvania's Wharton School of Business and considered one of the fathers of the CIMA® program (topic – Disruptive Trends in Finance Now and in the Future)
- Campbell Harvey, PhD – Professor of Finance, Fuqua School of Business, Duke University (topic – Decentralized Finance: Opportunities and Risk)
- Katherine Milkman, PhD – Professor Operations, Information and Decisions, The University of Pennsylvania's Wharton School of Business (topic – Decision Biases Improving the Quality of Our Everyday Decisions)
- Thomas Idzorek, CFA® – CIO, Morningstar Investment Management, LLC (topic - The Popularity Asset Pricing Model, ESG, and Personalized Portfolios)
- Jeff Bush – Industry thought leader, *The Washington Update* (topic – tax law changes and political scenarios in the coming year)

Click to view the complete list of speakers and topics.

WHY ATTEND

Financial planners, investment advisors, managers, analysts, consultants or other wealth management professionals will find the conference educational as well as actionable. Attendees will come away with enhanced skills and the ability to:

- Recommend strategies for investment clients that are actionable, repeatable, and defensible
- Reevaluate traditional investment management opinions, wisdom, and processes
- Identify the range of options available for impact and social investing
- Learn the best practices of adding private investments into a portfolio
- Educate taxable investors on the implications of proposed tax legislation
- Learn better methods of delivering investment advice and/or institutional consultation

DISRUPTION CREATES OPPORTUNITIES

Investment management is in flux, perhaps more than it has been in a long time. Active management is under pressure, with investors switching from active to index funds. New "smart beta" products offer low-cost exposures to many active ideas. Model portfolio use is rising and expected to continue, as are exchange-traded funds. Markets and regulations have changed significantly over the past 10-20 years, and data and technology – which are increasingly important for investment management – are evolving even more rapidly. Amid this change, professionals are wondering about the future of investment management. What ideas will influence its evolution? What types of products will flourish over the next 5-10 years? What's the best way negotiate the disruption and identify the opportunities?

"Our goal is to add value to advisors and their clients by providing an entertaining fusion of Ivy League-quality education and practical application," said Walters. "Academics will lay the groundwork of important research and ideas, while successful practitioners will share their playbooks. We also recognize that the value of the organization is, in large part, the community and connections made at these events can be career-defining. Even virtually, we have carefully planned thoughtful networking opportunities and chances to connect with speakers, practitioners and peers."

KEY DETAILS

WHAT: Investment Advisor Forum: Evolution of Investment Management
WHEN: December 7-8, 2021
WHERE: Livestream and On-Demand (from the convenience of your office)
CE: 15 credit hours
FEE: $995

Click here to register.

WHAT: Women in Wealth: Current Trends within ESG and Impact Investing
WHEN: December 8, 2021 at 3pm ET
WHERE: Livestream and On-Demand (from the convenience of your office)
CE: 1 credit hour
FEE: Free to attend this special one-hour segment thanks to Cambridge Investment Research, Inc.

Click here to register.

IN-PERSON EVENTS COMING IN 2022

- Investments and Wealth Forum, Fort Lauderdale, Jan. 31 – Feb. 1, 2022
- ACE Academy 2022, Nashville, May 15-18, 2022

MEDIA ALERTS AND PRESS REQUESTS

Journalists are invited to request a press pass to any and all of the above event.

In addition, a virtual press conference will be announced in Q1 2022. Facilitated by Marie Swift of Impact Communications, media questions posed in advance or live during the virtual meeting will be addressed by IWI members and executives. The focus of the press conference will be challenges financial advisors will be facing in 2022.

In late 2021, the IWI will issue a year-end report that details its scholarship program and ongoing commitment to diversity, equity and inclusion in the financial services profession.

For more information, contact Cindy Chaifetz, Chief Marketing Officer, Investments & Wealth Institute, at cchaifetz@i-w.org or 303-850-3079; or Marie Swift, CEO, Impact Communications, at marieswift@impactcommunications.org or 913-649-5009.

ABOUT INVESTMENTS & WEALTH INSTITUTE

Founded in 1985, the Investments & Wealth Institute is the premier professional association, education provider, and standards body for financial advisors. Through its award-winning events, publications, courses, and acclaimed certifications—Certified Investment Management Analyst® (CIMA®), Certified Private Wealth Advisor® (CPWA®), and Retirement Management Advisor® (RMA®) certifications—the Institute delivers Ivy league-quality, highly-practical education to more than 30,000 practitioners annually in over 40 countries. Members of the Institute include the industry's most successful investment consultants, advanced financial planners, and private wealth managers who embrace excellence and ethics in applying a broad set of knowledge and skills in their daily work with clients. Learn more at www.investmentsandwealth.org.

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