INVESTMENTS & WEALTH INSTITUTE®

WEALTH MANAGEMENT

Interested in Wealth Management and unsure where to start?
The Investments & Wealth Institute has a variety of options suited to your learning style, CE needs and more. Below, find short, 1-hour recordings; live, 4-hour virtual events; and in-depth courses for 8 to 20 CE hours. Ultimately, take your education and credentials to the next level with a Certified Private Wealth Advisor (CPWA®) certification.

Topic	CE Hours	Type	Cost
HNW Tax Strategies On-Demand	4	On-demand	Member: $249 Join & Learn: $449
Wealth Advisor Forum On-Demand	4	On-demand	Member: $249 Join & Learn: $449
Focus on Investment Portfolios for HNW Clients	4	Virtual event Nov. 10, 2020 11 a.m.– 3:30 p.m.	Member: $195 **Join & Learn: $445
Private Wealth Essentials Course	14.5*	Course	Member: $795 Join & Learn: $995
Certified Private Wealth Advisor (CPWA)	40*	Certification	Costs vary depending upon provider
Philanthropic Advising for the High-Net-Worth Client	N/A	Podcast	Free
Estate Planning and Charitable Giving With Martin Shenkman	N/A	Podcast	Free
Advanced Roth Conversion Strategies w/Michael Kitces	N/A	Podcast	Free
QBI Reduction, Small Business Owners, and the 199A Tax Act w/Jeffrey Levine	N/A	Podcast	Free
How to stay ahead of the tax law changes impacting investors today	N/A	Blog	Free

On-demand recording: 1 CE hour, quick and convenient

* includes CFP CE
** Join and learn includes 1-year membership

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