NEWS

FOR IMMEDIATE RELEASE

Contact:

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

Investments & Wealth Institute Announces First In-Person Event for 2022

Investments & Wealth Forum promises "Trustworthy Solutions for New Retirement Challenges"

Journalists welcome to join financial conference being held Jan. 31-Feb. 1, 2022 in Fort Lauderdale

DENVER – December 29, 2021 – The Investments & Wealth Institute (IWI), the premier professional association, education provider, and standards body for financial advisors, today announced details for their first 2022 in-person conference, the Investments & Wealth Forum, to be held Jan. 31-Feb. 1, in Fort Lauderdale. It will also be available on-demand beginning Feb. 4. Journalists are invited to request a press pass. Financial professionals are invited to register now.

"The retirement planning and wealth management professions have evolved and grown considerably in recent years," said IWI CEO Sean Walters, CAE®. "There is now an incredible need to unite and connect key players in the wealth management ecosystem to solve unique challenges. Clients are demanding more sophisticated wealth management, beyond financial planning – to optimize their retirement *lives*, not just their wealth. The 2022 Investments & Wealth Forum will provide trustworthy solutions for new retirement challenges."

TRUSTWORTHY SOLUTIONS FOR NEW RETIREMENT CHALLENGES

Retirement management is in flux, arguably more than it has been in a long time. Clients are living longer, have more goals in retirement, have more sophisticated portfolios and assets, and simply demand more. At the same time, retirement planning has never had so many challenges and uncertainties – such as low yields, a global health pandemic, inflation, market uncertainties, and much more.

With so much change, advisors are looking for insights into the future of wealth and retirement management and the ideas that will influence its evolution.

This conference, a fusion of Ivy League thought-leadership and research with practical application, will provide wealth management and retirement advisors the ability to add significant value to clients by finding solutions for:

- Retirement security despite of a global crisis
- Optimizing retirement taxation amid new legislative proposals
- Providing reliable retirement income in a low yield environment
- Transferring wealth effectively and tax-efficiently to heirs
- Managing family wealth dynamics
- Navigating sudden transitions such as leaving the workforce, health problems, or death of a loved one
- Funding a longer retirement horizon due to increased longevity

WHY ATTEND

Investment advisors, managers, analysts, consultants or other wealth management professionals; CIMA®/CPWA®/RMA® and/or CFP® certificants or candidates; or any type of financial services provider, will find the conference educational, as well as actionable. Attendees will come away with enhanced skills and the ability to:

- Recommend wealth management strategies for retirement clients that are actionable, repeatable, and defensible
- Reevaluate traditional wealth and retirement opinions, wisdom, and processes
- Identify the range of options available for retirement income and risk management
- Educate taxable investors on the implications of proposed tax legislation
- Develop a decision-making framework for claiming Social Security and Medicare benefits
- Learn better methods of delivering wealth retirement advice
- Discover opportunities to engage clients beyond wealth management, providing value for their health, wellness, and purpose
- Meet and connect with 200+ senior wealth management and retirement advisors

KEY DETAILS

WHAT:	Investments & Wealth Forum: Trustworthy Solutions for New Retirement Challenges
WHEN:	January 31 – February 1, 2022
WHERE:	The Diplomat Beach Resort, Hollywood **(**Fort Lauderdale), Florida
CE:	13 credit hours
FEE:	$995 ($895 special rate through Jan. 5), $795 on demand registration

Click here to register.

Journalists are invited to request a press pass to any and all of the above (please contact one of the media contacts listed on this release).

VIRTUAL PRESS CONFERENCE – COMING SOON

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

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.

DIGITAL BADGING – AVAILABLE NOW

After 30 years of providing professional development and credentialing, Investments and Wealth Institute in December 2021 launched digital badging, so that individuals can share their skills with colleagues, peers, employers, clients, and prospects. This allows financial advisors to modernize how individuals display their industry knowledge, skills, and expertise.

“As we enter a new digital era of credentialing via digital badges we see the introduction of competency-based education (CBE) as a key marketplace trend that will continue to gain traction in the digital badges market in the education sector during the next few years,” Walters said. “Digital badges can be added to your email signature to convey your professional designation or added to your LinkedIn certifications in one click. We believe these credentials enhance the value of your membership and your certifications with a convenient and professional representation.”

A complete set of FAQs is available here: https://content.investmentsandwealth.org/digital-badging-faq

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®)—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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