

NEWS
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Investments & Wealth Institute Announces 2022 Chair and New Board Members

DENVER – December 15, 2021 – **The Investments & Wealth Institute** (IWI), the premier professional association, education provider, and standards body for financial advisors, today announced the Chair-elect and new members of the 13-member Board of Directors.

Dorothy Bossung, CIMA®, CPWA®, RMA®, CFP®, a Board member since 2014 and currently Vice Chair, has been elected to serve a two-year term as Chair beginning January 1, 2022. Bossung is Director at BDO Wealth Advisors, LLC, a national RIA firm and part of BDO USA, LLP, the world's fifth largest accounting firm. A 40-year industry veteran, Bossung has extensive experience as a personal advisor to high-net-worth families and as a consultant for non-profits, endowments, and foundations, emphasizing preservation and growth of assets.

NEW BOARD MEMBERS

The newly-elected Board members, who will serve two-year terms, are:

- Douglas D. Hanson, CIMA®, Senior Relationship Manager at Charles Schwab in San Francisco, who has been in the financial services industry for more than 35 years.
- Deidre Waltz, CIMA®, CPWA®, Vice President, Relationship Manager, Heritage Trust Company in Oklahoma City, who has been working in the trust financial services industry for more than 35 years.
- Hatem Zarrouk, CIMA®, Vice President National Sales, Relationship Management & Service Delivery, National Bank Independent Network in Toronto, Canada. Fluent in English, French and Arabic, he has more than 20 years of experience in the financial services industry.

CONTINUING BOARD MEMBERS

In addition to Bossung, the following officers were elected for two-year terms commencing January 1, 2022:

- Elizabeth “Libet” Anderson, CIMA®, Vice Chair of Finance – Based in Birmingham, AL, Anderson is President at Concourse Financial Group Securities (formerly ProEquities)
- Christine Gaze, CIMA®, Vice Chair of Professional Development – Based in Darien, CT, Gaze is Founder and President at Purpose Consulting Group
- Scott Welch, CIMA®, Vice Chair of Standards – Based in New York, NY, Welch is Chief Investment Officer – Model Portfolios at WisdomTree Asset Management

Directors-at-large continuing terms on the 2022 Board of Directors are:

- Chris Bidwell, CIMA®, RMA®, CIMC® – Based in Centerville, OH, Bidwell is a Vice President, Wealth Management, and Senior Investment Management Consultant at Morgan Stanley
- Brian Konish, CPWA®, CFP®, CeXP – Based in Boston, MA, Konish is Managing Director – Investments at K|B Private Wealth Management Group of Wells Fargo Advisors
- Lauris S. Lamberg, CIMA®, CHSA® – Based in Newton, MA, Lamberg is Co-founder and Chief Investment Officer at Renaissance Wealth Advisors, LLC
- Desiree Maldonado, CIMA®, CPWA®, CFP® – Based in San Juan, PR, Maldonado is a Financial Consultant at Popular Securities, LLC
- Noel Pacarro Brown, CIMA®, CPWA® – Based in Portland, OR, Brown is the Investing with Impact Director and a Family Wealth Advisor, First Vice President at The Conscious Wealth Management Group at Morgan Stanley
- Todd Wagenberg, CIMA®, Immediate Past-chair – based in Birmingham, MI, Wagenberg is Managing Partner, Integrated Fiduciary Advisory Services, LLC

OUTGOING BOARD MEMBERS

IWI appreciates the commitment of the Board members who are completing their terms as of December 31, 2021:

- Kevin Sánchez, CIMA®, CPWA®, CFP®, Senior Institutional Consultant, UBS Institutional Consulting, Walnut Creek, CA
- Brian Ullsperger, CIMA®, AIF®, Managing Director, Investment Consulting Services at Andersen Tax, Montara, CA
- Kelly S. Walsh, CIMA®, RCC®, Director, Global Wealth Consulting & Capital Markets, at CGI, Inc., Coquitlam, BC, Canada

COMMITMENT TO SERVING THE EVOLVING NEEDS OF THE INDUSTRY

The last decade has seen incredible changes in the financial advisory profession, including the growth of the Registered Investment Advisor and hybrid models. The Securities and Exchange Commission (SEC) lists over 13,800 RIA firms serving over 40 million clients. As the premier association representing financial advisors, IWI's membership reflects the profession's increasing diversity of business models.

“We pride ourselves on being the premier professional association, education provider, and standards body for financial advisors,” said IWI CEO Sean R. Walters, CAE®. “We have always been business-model-agnostic and have adapted well to changes within the industry and the profession, thanks to strong leadership from a vibrant, engaged, and talented Board of Directors.”

The schedule of virtual and live events—including the two and a half day Investments and Wealth Forum, Ft. Lauderdale, FL happening January 30-February 1, 2022, will focus on retirement and wealth strategies—is available here: <https://investmentsandwealth.org/conferencecalendar>

Journalists are invited to participate in all IWI open enrollment events. If interested, please request a press pass from one of the media contacts listed above.

ABOUT THE 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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