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Brian Hunter, CIMA®, Accepts IMCA® Writing Award

BOSTON – Investment Management Consultants Association® (IMCA®) presented four prestigious awards today at its 2014 Annual Conference, recognizing outstanding contributions to IMCA and the investment industry.

Brian Hunter, CIMA®, was awarded the Stephen L. Kessler Writing Award for his article “The Reality Linking Investment Selection, Dynamic Asset Allocation, and Risk Management,” co-authored with Ashish Kulkarni and published in the March/April 2013 issue of IMCA’s *Investments & Wealth Monitor*. Hunter is managing director of Strategic Capital Allocation Group in Boston.

The Kessler award honors IMCA members for their excellent editorial contributions during the previous year to IMCA’s *Investments & Wealth Monitor*.

Two authors were also recognized with honorable distinction awards for the Kessler Writing Award. David Loeper, retired chief executive officer and founder of Wealthcare Capital Management, was recognized for his work “The Price of Safe Withdrawal Rates” in the November/December 2013 issue. And Robert G. Smith III, president, chief investment officer, and principal at Sage Advisory Services, is honored for “Risk Parity: An Alternative Approach to Asset Allocation,” co-authored with Alexander Pekker and Meghan Elwell in the July/August 2013 issue.

Richard Marston, Ph.D., is the 2014 recipient of the Matthew R. McArthur Award for his outstanding contributions to the profession of investment management consulting.

Professor Marston is the James R. F. Guy Professor of Finance, professor of economics; and director at the Weiss Center for International Financial Research at The Wharton School, University of Pennsylvania. He was instrumental in development of

IMCA's Certified Investment Management Analyst® (CIMA®) program and has been a vital and energetic contributor since the program's earliest days.

IMCA's Richard J. Davis Ethics Award honors the author of an article that has made a significant contribution to advancing the understanding and knowledge of investment consulting and/or private wealth management in the area of ethics, and/or the fiduciary, legal, or regulatory issues that affect these professional practices.

Robert H. Sitkoff, JD, the John L. Gray Professor of Law at Harvard University, is recognized for his article "The Fiduciary Obligations of Financial Advisers under the Law of Agency," published in the *Journal of Financial Planning*. An expert in wills, trusts, estates, and fiduciary administration, Professor Sitkoff's research focuses on economic and empirical analysis of the law of trusts and estates.

Marianne M. Jennings, professor emeritus of legal and ethical studies in business at the W. P. Carey School of Business at Arizona State University, was also recognized in the Ethics category with an award of Honorable Distinction. She is honored for her article "Ethics and Financial Markets: The Role of the Analyst" published by The Research Foundation of CFA Institute.

Jim Pasztor, MSF, MPASSM, CFP®, vice president of academic affairs and associate professor at the College for Financial Planning, is the recipient of the 2014 Edward D. Baker III Journal Award. The award honors the author of an original article that represents the best writing for the previous year and is germane to investment consulting and/or private wealth management and published in the *Journal of Investment Consulting*.

Pasztor is recognized for his article "Endogenous Risk and Dangers to Market Stability," which appeared in the *Journal of Investment Consulting* in 2013.

And IMCA is pleased to recognize longtime IMCA member and past president Garry Bridgeman with the honorary designation of IMCA Director Emeritus. Bridgeman is Executive Director, Financial Advisor, and Institutional Consulting Director at the Atlanta Wealth Management office of Graystone Consulting, a business of Morgan Stanley. He served as IMCA President during 2008–2009.

"Garry Bridgeman is an excellent example of the kind of quality professionals IMCA counts as its members," IMCA Chair John Nersesian said. "Under his leadership, IMCA experienced significant growth in membership and a successful launch of our second certification program, the Certified Private Wealth Advisor® (CPWA®). We look forward to Garry's ongoing counsel as Director Emeritus."

Click [here](#) to learn more about IMCA's awards and to read the award-winning articles.

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Established in 1985, IMCA is a nonprofit professional association and credentialing organization with more than 9,400 individual members. IMCA members collectively manage more than \$1.9 trillion, providing investment consulting and wealth management services to individual and institutional clients. Since 1988, IMCA has offered the Certified Investment Management Analyst® (CIMA®) certification, which earned accreditation by the American National Standards Institute (ANSI) in April 2011, making it the first financial services credential in the United States to meet international standards (ISO 17024) for personnel certification. IMCA's Certified Private Wealth Advisor® (CPWA®) certification is suited for wealth management professionals working with high-net-worth clients. In 2013, IMCA conferences and workshops hosted more than 4,000 attendees.

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