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## Local Financial Professional Gains Expertise at Investment Management Consultants Association's 2015 Winter Institute

ASHTABULA OHIO...December 4, 2015 DANIEL M. HUFFMAN, CFP® Managing Director – Investment Officer of Wells Fargo Advisors, LLC in Ashtabula enhanced his industry knowledge at the Investment Management Consultants Association® (IMCA®) 2015 Winter Institute in Scottsdale, December 3-4. Focused on retirement and decumulation, IMCA's 2015 Winter Institute offered the latest thinking and insight on today's retirement challenges with timely and relevant presentations by behavioral finance experts, financial advisors practitioners, and cutting-edge academics. Throughout the event, Mr. Huffman heard insightful analysis from a wide range of speakers, including:

□ Professor at the School of Public Health at the University of Illinois at Chicago, research associate at the Center on Aging at the University of Chicago, and chief scientist at Lapetus Solutions, Inc., **S. Jay Olshanksy** / *The Longevity Dividend*

□ New York Times best-selling author and the William Fairfield Warren Professor and professor of economics at Boston University, **Laurence J Kotlikoff** / *Social Security Reform*

□ **Ric Edelman**, chairman and chief executive officer of Edelman Financial Services, LLC, and New York Times best-selling author of several personal finance books, including *The Truth About Money / Singularity and the Future of Financial Planning*

□ **Michael Cox**, director of the O'Neil Center for Global Markets and Freedom at Southern Methodist University's Cox School of Business, and president and chief executive officer of W. Michael Cox and Associates, LLP / *Age Shift; An Optimistic Perspective on America's Hard Times*

□ **Sarbjit Nahal**, head of the thematic investing strategy team at bank of America Merrill Lynch Global Research / *Thematic Investing: Focus on Innovation and Technology*

□ Financial planner professional engineer, chartist, financial writer, and founder of retirementoptimizer.com, **Jim Otar** / *Managing Asset Decumulation in the Absence of Luck*

□ **Corey Ciocchetti**, associate professor of business ethics and legal studies at the University of Denver / *Professionalism and Your Iron Ring*

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IMCA's 2015 Winter Institute also offered a variety of Workshops that provided a close look at current issues facing the financial markets deemed relevant for investment advisors worldwide, including the following:

- *The 4-Percent Rule is Not Safe in a Low-Yield World / Michael S Finke of Texas Tech University*
- *Are Robo-Advisors a Good Idea for Investors? / Ed Butowsky of Chapwood Capital Investment Management*
- *Estate Planning and the Role of the Investment and Wealth Advisor / Christopher W Boyett of Holland & Knight LLP*
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Huffman says, "It was a privilege to hear from such highly regarded professors. Their **subject matter was pertinent to the challenges and opportunities the financial industry** faces today."

Huffman began his career as a representative with Edward D. Jones. In 1985 he moved his financial practice to A.G. Edwards, a predecessor of Wells Fargo Advisors. He has served Ashtabula area investors since 1982. Huffman is a graduate of Indiana University and a Winner's Circle Premier Advisor\*. The Premier Advisors designation is held by a select group of Financial Advisors within Wells Fargo Advisors and reflects a high level of standards measured by one or more of the firm's criteria for revenue generation, educational attainment and client-service best practices.

#### **About IMCA**

Established in 1985, IMCA is a nonprofit professional association and credentialing organization with more than 10,000 individual members and certificants worldwide. IMCA members collectively manage more than \$2.477 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 2014, IMCA conferences and workshops hosted approximately 4,000 attendees. IMCA® and Investment Management Consultants Association® are registered trademarks of Investment Management Consultants Association Inc. CIMA®, Certified Investment Management Analyst®, CIMC®, CPWA®, and Certified Private Wealth Advisor® are registered certification marks of Investment Management Consultants Association Inc. Investment Management Consultants Association Inc. does not discriminate in educational opportunities or practices on the basis of race, color, religion, gender, national origin, age, disability, or any other characteristic protected by law. Visit [www.IMCA.org](http://www.IMCA.org) for more information

*Investment products and services are offered through Wells Fargo Advisors, LLC.*

#### **About Wells Fargo Advisors**

With \$1.4 trillion in client assets as of December 31, 2015, Wells Fargo Advisors provides investment advice and guidance to clients through 14,960 full-service financial advisors and 3,933 licensed bankers. This vast network of advisors, one of the nation's largest, serves investors through locations in all 50 states and the District of

Columbia. Wells Fargo Advisors is the trade name used by two separate registered broker-dealers and non-bank affiliates of Wells Fargo & Company: Wells Fargo Advisors, LLC and Wells Fargo Advisors Financial Network, LLC (members SIPC). Statistics include other broker-dealers of Wells Fargo & Company. [www.wellsfargo.com](http://www.wellsfargo.com)

### ***About Wells Fargo***

Wells Fargo & Company (NYSE: WFC) is a diversified, community-based financial services company with \$1.8 trillion in assets. Founded in 1852 and headquartered in San Francisco, Wells Fargo provides banking, insurance, investments, mortgage, and consumer and commercial finance through 8,700 locations, approximately 13,000 ATMs, the internet ([wellsfargo.com](http://wellsfargo.com)) and mobile banking, and has offices in 36 countries to support customers who conduct business in the global economy. With approximately 265,000 team members, Wells Fargo serves one in three households in the United States. Wells Fargo & Company was ranked No. 30 on Fortune's 2015 rankings of America's largest corporations. Wells Fargo's vision is to satisfy our customers' financial needs and help them succeed financially. Wells Fargo perspectives are also available at [Wells Fargo Blogs](#) and [Wells Fargo Stories](#).

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