IMCA Awards Recognize Outstanding Achievement

IMCA Honors Meir Statman with Matthew R. McArthur Industry Pioneer Award; Jean L. P. Brunel with J. Richard Joyner Wealth Management Impact Award

Las Vegas, NV (PRWEB) April 28, 2015 -- Investment Management Consultants Association® (IMCA®) presented five prestigious awards today at its 2015 Annual Conference, recognizing outstanding contributions to IMCA and the investment industry.

The J. Richard Joyner Wealth Management Impact Award is a new award for 2015, named after Richard Joyner, who was instrumental in the development of and instruction within IMCA’s Certified Private Wealth Advisor® (CPWA®) certification program. The award recognizes key innovations and thought leadership in any of the following CPWA knowledge domains: human dynamics (behavioral economics and family dynamics); wealth management strategies (tax, portfolio, risk management, and asset protection); client specialization (closely held business owners, executives, and retirement); and legacy planning (charitable and estate planning).

The first recipient of this award is Jean L. P. Brunel, CFA®, who was recognized for his body of work on goals-based wealth management and his contributions to the field as editor of the Journal of Wealth Management since its founding in 1998. Brunel is the managing principal of Brunel Associates, LLC, a firm that serves ultra-high-net-worth individuals and their advisors. He is the author of the book Integrated Wealth Management: The New Direction for Portfolio Managers and most recently, Goals-Based Wealth Management: An Integrated and Practical Approach to Changing the Structure of Wealth Advisory Practices.

Meir Statman, PhD, is the 2015 recipient of the Matthew R. McArthur Industry Pioneer Award for his outstanding contributions to the profession of investment consulting. Statman is the Glenn Klimek Professor of Finance at Santa Clara University. His research focuses on behavioral finance. He attempts to understand how investors and managers make financial decisions and how these decisions are reflected in financial markets. He is the author of the award-winning book, What Investors Really Want.

IMCA’s Richard J. Davis Ethics, Legal, Regulatory Insight 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.

Polina A. Demina, an associate at Sullivan & Cromwell LLP in New York, was recognized for her article, “Broker-Dealers and Investment Advisers: A Behavioral-Economics Analysis of Competing Suggestions for Reform” (Michigan Law Review 113, no. 3, January 2015: 429–459). She earned a JD from the University of Michigan Law School, where she was an associate and contributing editor of the Michigan Law Review.


David J. Garff, CIMA®, president and chief investment officer of Accuvest Global Advisors, received the 2015 Edward D. Baker III Journal Research Award. The award honors the author of an original article that represents
the best writing for the previous year, is germane to investment consulting and/or private wealth management, and was published in the Journal of Investment Consulting.

Garff is recognized for his paper “Multi-Style Global Equity Investing: A Statistical Study on Combining Fundamentals, Momentum, Risk, and Valuation for Improved Performance” (Journal of Investment Consulting 15, no. 1, 2014: 12–26).

Three authors were recognized with a Baker Honorable Distinction award for their paper “The Relative Asset Pricing Model: Toward a Unified Theory of Asset Pricing” (Journal of Investment Consulting 15, no. 1, 2014: 51–66). The authors are: Arun Muralidhar, PhD, adjunct professor of finance at George Washington University and founder of Mcube Investment Technologies; Kazuhiko Ohashi, PhD, professor of finance at the Graduate School of International Corporate Strategy at Hitotsubashi University in Tokyo; and Sunghwan Shin, PhD, professor of finance at Hongik University in Seoul, South Korea.

The Stephen L. Kessler Writing Award honors IMCA members for their excellent editorial contributions during the previous year to IMCA’s Investments & Wealth Monitor. IMCA honored Michael Underhill, with the Kessler Writing Award for his article “Master Limited Partnership Investing: A Case for MLPs as a Core Allocation in Your Portfolio” (Investments & Wealth Monitor 29, no. 4, July/August 2014: 52–56). Underhill is founder and chief investment officer of Capital Innovations, LLC, author of The Handbook of Infrastructure Investing, and a professor at École des Hautes Etudes Commerciales du Nord (Paris, France), where he teaches real asset investing.

Two authors also were recognized with Kessler Honorable Distinction awards. Anthony B. Davidow, CIMA®, was recognized for his article “Alternative Beta Strategies: An Evaluation of Different Approaches” (Investments & Wealth Monitor 29, no. 3, May/June 2014: 18–22, 51). Davidow is vice president, alternative beta and asset allocation strategist for the Schwab Center for Financial Research.

The second honorable distinction award went to Scott D. Welch, CIMA®, for his article “Six Habits of Highly Successful Advisors” (Investments & Wealth Monitor 29, no. 2, March/April 2014: 8–12). Welch is founder of UnconstrainedThought, a macro-economic, investment, and wealth management consultancy and is also a co-founder and former chief investment officer of Fortigent, LLC

Click here to learn more about IMCA’s awards and to read the award-winning articles.

Contact: Ryan Hoffman, Communications Director. P: 303.850.3079 M: 303.359.3773. Email: rhoffman@imca.org. Twitter:@IMCA

About IMCA
Established in 1985, Investment Management Consultants Association® (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 nearly 4,000 attendees.
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Contact Information
Ryan Hoffman
Investment Management Consultants Association
http://www.IMCA.org
+1 303.850.3079

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