



Advanced Education for
Investment & Wealth Professionals



Introducing an online Applied Behavioral Finance Certificate Program

Meir Statman, Andrew Lo, Dan Ariely, and Carl Richards anchor online program

No matter what's happening with interest rates or markets, behavioral finance affects us all—client and advisor alike. That's why IMCA recently introduced an online Applied Behavioral Finance Certificate Program designed to help advisors address common financial decisions that trip up even today's savviest investors.

Several noted behavioral finance experts deliver 20 hours of engaging content designed to give advisors actionable tools and strategies to implement with their clients. "When we see that the suit in our closet no longer fits, we don't go to the surgeon to change our body; we go to the tailor to change the suit," Santa Clara University's Meir Statman says in the program's introduction. "Trying to change people to make them rational makes no sense. We have to tailor our solutions to their problems."

Program curriculum consists of 20 modules within four sections: 1. Why Behavioral Finance? 2. Principles of Behavioral Finance. 3. Behavioral Finance and Investing, and 4. Communicating with Clients in Light of Behavioral Finance.

"Demand for behavioral finance knowledge, and strategies for how to apply it in practice, has never been higher," said Sean R. Walters, CAE, IMCA's executive director and CEO. "Our program will help advisors confidently guide their clients through important investing scenarios and help them make better decisions when they may not be at their rational best."

Program at-a-glance:

- **Format:** Twenty online modules consisting of videos and exercises; "deeper dive" resources, practical applications and quizzes.
- **Continuing Education (CE):** Accepted by the CFP Board for 20 hours of CE credit for CFP certification. Accepted by IMCA for 20 hours of CIMA® and CPWA® CE credit.
- **Cost:** \$695 for IMCA members; \$895 to join and learn.
- **Register and learn more at** www.IMCA.org/ABF
- **Watch three short video previews of the program at** www.IMCA.org/pages/Applied-Behavioral-Finance-Certificate-Program-Preview.

Applied Behavioral Finance



Dan Ariely



Andrew Lo



Carl Richards



Meir Statman



Tobias Moskowitz