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Hoffman Earns Accredited Investment Fiduciary Designation

George Hoffman, Wealth Advisor, with Hermening Financial Group, recently earned the Accredited Investment Fiduciary designation after fulfilling training and examination requirements at Cetera Financial Group's Wealth Management University in Austin, Texas. This invitation-only conference, which attracts more than 200 Cetera Financial Group advisors from across the United States, opened on Monday, October 17, 2016 with a keynote speech provided by The Washington Update's Jeff Bush, a 27-year veteran of the financial industry who is known for his expertise on the U.S. government's fiscal matters. The remainder of the conference consisted of highly intensive training and professional engagement among advisors.

Wealth Management University presents a wide range of learning opportunities every year, and is designed to introduce advisors to new investment strategies, improve their comprehensive wealth management skills, and help them boost their advisory assets under management ("AUM"). The AIF Capstone training program, developed and administered by fi360, enables advisors to proactively approach the fiduciary standard by implementing prudent practices and developing a revamped process for serving clients. Following the training, participants sit for an exam that determines whether they receive the designation.

"The DOL rule issued in April is expected to expand the investment advice fiduciary definition. It is extremely important to engage in events like Wealth Management University to complete the required training, exchange ideas with other industry professionals and earn my AIF® designation," said Hoffman. "I look forward to incorporating these ideas into my practice."

In addition to Jeff Bush's presentation titled "From the Hill to the Street: An Insiders Perspective," the program offered additional insight from some of the industry's leading experts, such as:

- Chris Hennessey, Business Advisory Group Consultant of Putnam Investments, "Asset Protection;"
- Craig Columbus, President & CEO, Tower Square Investment Management, "Election Countdown: Preparing Portfolios for November 8 and Beyond;"
- Mark Zinder, President, Mark Zinder and Associates, "What Happens Next?"
- Mark Quinn, Director of Regulatory Affairs, Cetera Financial Group, "DOL Rule Impact;"

Brad Best, Director of Advisor Education at Cetera Financial Group, says, "We're honored to facilitate these types of learning and development experiences for our advisors. Ensuring that advisor practices are in accordance with the new DOL legislation is our utmost priority. Wealth Management University consists of tested, proven ideas that not only offer an effective way to convey useful knowledge and meaningful advice to our advisors, but also empower them to educate their clients."

Hermening Financial Group has offices based in Eau Claire, Manitowoc, Stevens Point, Wausau and Wisconsin Rapids. The group's independence allows it to offer an unbiased, objective approach to serving your investment needs. The firm offers comprehensive financial planning and investment services to a broad range of clients.

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