Kimberly Jamieson Earns Certified Plan Fiduciary Advisor Certification

SOUTHFIELD, MICHIGAN, UNITED STATES, May 2, 2024 / EINPresswire.com/ -- Kimberly Jamieson, a resident of Livonia, MI, recently earned her CPFA® (Certified Plan Fiduciary Advisor) designation from the National Association of Plan Advisors. Advisors who earn their CPFA® demonstrate the expertise required to act as a plan fiduciary or help plan fiduciaries manage their roles and responsibilities.

Kimberly Jamieson

Individuals who complete the program, pass a final exam and sign both a code of ethics and a disclosure form can earn the right to use the CPFA® mark. Graduates of the CPFA® Program must complete a specialized independent study course encompassing pre- and post-retirement needs, asset management, estate planning, and the entire retirement planning process using models and techniques from real client situations. The CPFA® Program prepares individuals for the changing demands of the retirement planning profession. The CPFA® curriculum emphasizes the importance of understanding each client's financial situation and then analyzing his or her related needs and identifying investment opportunities that will best meet those needs.

"We are proud of Kimberly's achievement and her dedication to meeting the financial needs of clients," commented Nick J. Valenti, managing partner of Michigan Financial Companies which is based in Southfield, MI.

Kimberly, who is a Financial Planner with Michigan Financial Companies-Golden Legacy Wealth Management, knows that good financial planning isn't about luck: it's about having a plan. She has built her practice around putting her client's interests first and wholly believes in helping them craft a plan that allows them to meet both short- and long-term financial goals.

About Michigan Financial Companies

Michigan Financial Companies has been helping individuals, families, and business owners protect and grow their assets and realize their financial goals for over 30 years. With over 20 offices across seven states, their representatives provide financial guidance to clients across the country: each with unique financial needs.

Securities and investment advisory services offered through Osaic Wealth, Inc. member FINRA/SIPC. Osaic Wealth is separately owned and other entities and/or marketing names, products or services referenced here are independent of Osaic Wealth.

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