

Lizzie Dipp Metzger Earns Advanced Wealth Management Designation Certified Private Wealth Advisor®

EL PASO, TX, UNITED STATES, February 7, 2025 /EINPresswire.com/ -- [Crown](#)

[Wealth Strategies](#) is proud to announce that Lizzie Dipp Metzger, founder, and president, has achieved her Certified Private Wealth Advisor (CPWA®) designation through the Investments & Wealth Institute and taught in conjunction with University of Chicago Booth School of Business.



This achievement reflects my commitment to continuous learning and my dedication to providing the best possible advice and service to my clients."

Lizzie Dipp Metzger

This designation is a testament to her commitment to excellence in the field of private wealth management and showcases her dedication to providing the highest level of service to her clients.

Lizzie Dipp Metzger, CPWA®, CFP®, MSFS, AEP®, President at Crown Wealth Strategies in El Paso TX, recently earned the Certified Private Wealth Advisor® designation, which is an advanced professional certification for advisors who provide the breadth of specialized skills required to meet

the needs of high-net-worth clients. The CPWA® designation, issued by the Investments & Wealth Institute and taught in conjunction with the esteemed University of Chicago Booth School of Business, is one of the most rigorous and prestigious designations in the industry. It requires a comprehensive understanding of the needs of high-net-worth clients and the complexities of their financial situations. To earn this qualification, candidates must complete an extensive educational program, pass a challenging exam, and demonstrate significant experience in the wealth management field.

Lizzie Dipp Metzger is the founder and president of Crown Wealth Strategies, a comprehensive wealth solutions practice, serving clients nationwide. Lizzie is a Certified Financial Planner and a fiduciary in her investment advisory services, known for providing an integrated financial and insurance strategy focused on maximizing value for her clients. She primarily supports families, business owners, and affluent individuals in retirement, college, estate, and business planning. Lizzie has been recognized by New York Life for outstanding production as an agent on multiple occasions, including as the company's Council president. She also has been recognized as one of the top financial security professionals nationally by Forbes.*

"Earning the CPWA® designation represents a significant milestone in my career," said Lizzie Dipp Metzger. "This achievement reflects my commitment to continuous learning and my dedication to providing the best possible advice and service to my clients."

High-net-worth individuals have unique needs that require an advisor to have more than just a basic financial planning background. The Certified Private Wealth Advisor® (CPWA®) designation program is an advanced credential created specifically for wealth managers working with high-net worth clients. Developed by the Investments & Wealth Institute®, the CPWA® program focuses on the life cycle of wealth accumulation,

preservation, and distribution. CPWA® professionals are able to identify and analyze the unique challenges high-net worth individuals face and understand how to develop specific strategies to minimize taxes, monetize and protect assets, maximize growth, and transfer wealth. The program has an approximately six-month long pre-study program and concludes with a 4-day session. Program faculty include both University of Chicago Booth School of Business professors and experienced practitioners - wealth managers, retirement planning specialists, investment managers, tax professionals, and estate-planning and asset-protection attorneys. Designed for wealth managers who advise high-net-worth clients, this program is open to those who have five years of relevant experience and have completed the pre-study educational component.

About Crown Wealth Strategies Crown Wealth Strategies specializes in addressing the unique financial challenges faced by high-net worth individuals. We offer bespoke solutions for complex financial, intergenerational, estate, and charitable planning needs. Our mission is to empower our clients through education, strategic planning, and personalized financial solutions. We believe in giving back to the community that has supported us. Crown Wealth Strategies actively participates in community service projects, educational programs, and philanthropic activities. We are proud to contribute to the growth and development of our community, ensuring a better future for all.

Lizzie's leadership within the broader financial services industry sets a high standard for advisors everywhere.

Lizzie Earns Prestigious Certified Private Wealth Advisor® (CPWA®) Designation, Elevating Expertise in Private Wealth Management

Click the link to read more!

LizzieDippMetzgerCPWA

* Lizzie Dipp Metzger is a Financial Adviser offering investment advisory services through Eagle Strategies LLC, a Registered Investment Adviser. Crown Wealth Strategies is independently owned and operated from Eagle Strategies LLC and its affiliates. Council is an annual New York Life recognition program based on agent production from July 1- June 30. Read more about the Forbes SHOOK® Research Top Financial Security Professionals list and the ranking methodology here: <https://www.forbes.com/sites/rjshook/2024/07/10/methodology-americas-top-financial-security-professionals-2024/>

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