

MONUMENT WEALTH MANAGEMENT ADDS THIRD CFA CHARTERHOLDER TO THEIR TEAM

ALEXANDRIA, VA, UNITED STATES, April 27, 2026 /EINPresswire.com/ --

Monument Wealth Management, a leading independent wealth management firm, today announced that Portfolio Manager Nate Tonsager, CFA CIPM, has earned the Chartered Financial Analyst (CFA) designation — one of the most rigorous and respected credentials in the global investment industry. With this achievement, Monument now boasts three CFA charterholders on its wealth management team.



The CFA designation, awarded by the CFA Institute, requires candidates to pass three levels of examinations covering investment analysis, portfolio management, and ethical standards — a process that typically demands over 1,000 hours of study and takes most candidates four or more years to complete. Tonsager also holds the Certificate in Investment Performance Measurement (CIPM), reflecting his deep commitment to analytical analysis. He is also a co-host of Monument's [OFF THE WALL podcast](#) alongside CEO David B. Armstrong, CFA — delivering straightforward, candid market insights for successful investors on what's moving markets and why it matters for their portfolios.

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*David B. Armstrong, CFA - CEO
at Monument Wealth
Management*

“Earning the CFA charter is a milestone that reflects years of dedication and an unwavering commitment to doing right by our clients,” said Nate Tonsager, CFA, CIPM, Portfolio Manager at Monument Wealth Management. “I’m

proud to bring the knowledge I gained from each exam level to our Team and the people we serve every day.”

Three CFAs on one wealth management team is rare — and entirely intentional.

"The CFA is one of the hardest credentials in finance to earn. Having three charterholders on one wealth management team is genuinely rare, and it doesn't happen by accident," said David B. Armstrong, CFA, CEO and Co-Founder of Monument Wealth Management. "It's a testament to the caliber of people we attract and the culture of excellence we've built at Monument — and most importantly, it means our clients are being served by some of the most rigorously trained minds in the business."

Monument Wealth Management is the wealth strategy firm built for life's biggest decisions — [connecting the dots](#) across investments, equity compensation, estate planning, taxes, business exit strategies and more, so clients can move forward with intention and confidence.

ABOUT MONUMENT WEALTH MANAGEMENT

Monument Wealth Management is an independent, fee-only Registered Investment Advisor headquartered in Alexandria, VA. The firm serves successful, driven professionals who are ready to put their priorities first — acting as a strategic thinking partner to help clients Make Life Option Rich™. Using customized investment strategies and integrated financial planning, Monument helps clients get the clarity they need to navigate their most complex financial decisions with purpose and conviction. Learn more about the firm and their complimentary wealth check at www.monumentwealthmanagement.com/about/how-we-work/.

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