



For Immediate Release

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Ashtabula Financial Advisor Gains Insights at Gathering of Investment Leaders

DENVER – Ashtabula, Ohio-based financial services professional Daniel M. Huffman, CFP®, recently attended the Investment Management Consultants Association® (IMCA®) annual conference, hearing from and exchanging ideas with some of the country’s leading financial management thinkers.

Huffman, with more than 30 years’ experience, is currently Managing Director-Investment Officer and Branch Manager for Wells Fargo Advisors in Ashtabula. Since 1982, Huffman has worked with Ashtabula-area investors, helping them meet their financial needs by developing investment plans around their long-term goals and risk tolerance. His extensive experience – throughout major shifts in the markets – enables him to help investors structure balanced portfolios that address individual financial goals.

At the IMCA Annual Conference in Boston, May 5-7, Huffman joined some 1,500 industry leaders and heard the latest insights from Alan Blinder, Ph.D., former vice chairman of the Federal Reserve System Board; global economist Dambisa Moyo, Ph.D.; noted statistician and blogger Nate Silver; and leading financial strategists Jeff Kleintop, Jeffrey L. Knight, and Benjamin A. Pace.

The IMCA Annual Conference also included a packed schedule of intense workshops and lectures that helped advisors stay on top of global conditions, tax changes, federal regulations, health care legislation, and developments in wealth management tools such as hedge funds, alternative investments, asset allocation and retirement options. IMCA conferences are developed to provide insight, knowledge and strategies advisors can put to work with their clients immediately.

A graduate of Indiana University who earned the CERTIFIED FINANCIAL PLANNER® certification, Huffman is active in his community through the Ashtabula Chamber of Commerce and the Kiwanis Club. He is a member of IMCA, a certified Retirement Plan Consultant, and has earned one of Wells Fargo Advisors’ top awards, being named a Winner’s Circle Premier Advisor. He has twice been listed to *Barron’s* Top 100 Financial Advisors in the United States. *Barron’s* criteria was based on thousands of filtered nominations from investment, insurance banking and other related firms, which were narrowed down by quantitative and qualitative criteria as well as by examining regulatory records and talking with peers, supervisors, clients and the advisors themselves. Portfolio performance is not a criterion because most advisors do not have audited track records.

Dan is a member of the Huffman Mayer Wealth Management Group of Wells Fargo Advisors at 3705 State Rd Ashtabula Ohio. Huffman is a father of eight children and is active with the Great Lakes Bible Institute. In his free time, he enjoys spending time biking, hiking and playing basketball with his family.

The Premier Advisors designation is held by a select group of Financial Advisors within Wells Fargo Advisors and reflects a high level of standards as measured by one of more of the firm’s criteria for revenue generation, educational attainment and client-service best practices.

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Established in 1985, IMCA is a nonprofit professional association and credentialing organization with more than 9,400 individual members. IMCA members collectively manage more than \$1.9 trillion, providing investment consulting and wealth management services to individual and institutional clients. Since 1988, IMCA has offered the Certified Investment Management Analyst® (CIMA®) certification, which earned accreditation by the American National Standards Institute (ANSI) in April 2011, making it the first financial services credential in the United States to meet international standards (ISO 17024) for personnel certification. IMCA’s Certified Private Wealth Advisor® (CPWA®) certification is suited for wealth management professionals working with high-net-worth clients. In 2013, IMCA conferences and workshops hosted more than 4,000 attendees.

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