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Daniel M. Huffman, CFP®

Local Financial Professional Gains Expertise at IMCA 2013 Annual Conference in Seattle

Spotlight on Professional Responsibility Highlights Ethics

ASHTABULA OHIO...May 9, 2013 DANIEL M. HUFFMAN, CFP® Managing Director – Investment Officer of Wells Fargo Advisors, LLC in Ashtabula enhanced his industry knowledge at the Investment Management Consultants Association® (IMCA®) 2013 Annual Conference in Seattle, April 28–May 1. More than 1,500 attendees spent four days watching timely and relevant presentations by behavioral finance experts, financial advisor practitioners, and cutting-edge academics during the industry’s largest association gathering of investment advisors and wealth managers. Throughout the event, Mr. Huffman heard insightful analysis from a wide range of speakers, including:

□ **Meir Statman**, renowned behavioral finance expert, professor, and author | What Investors Really Want: Lessons from Behavioral Finance

□ **Anil Gupta**, Michael Dingman Chair in Global Strategy and Entrepreneurship at the Smith School of Business, The University of Maryland at College Park | Cultivating a Global Mindset

□ **Meredith Whitney**, one of *TIME* magazine’s 100 most influential people | Coping with Our Turbulent Economy: An Economic Update

□ **Phyllis Borzi**, Assistant Secretary of Labor at the Employee Benefits Security Administration | Spotlight on Fiduciary: Consultant and Advisor Fiduciary Standards and Trends under ERISA and Securities Laws

□ **William Shipman**, former delegate to the White House Conference on Social Security | Social Security Reform: An Unprecedented Global Challenge.

IMCA’s 2013 Annual Conference also featured a Spotlight on Professional Responsibility, with two engaging ethics focused presentations that reminded attendees about the responsibility to put client interests first:

□ **Dan Ariely**, James B. Duke Professor of Behavioral Economics at Duke University and author of *New York Times* bestsellers *Predictably Irrational* and *The Upside of Irrationality* | The (Honest) Truth about Dishonesty

□ **Neil Barofsky**, former federal prosecutor and Special Inspector General for the Troubled Asset Relief Program | Causes and responses to the financial crisis

Huffman says, “It was a privilege to hear from such highly regarded professors. Their subject matter was pertinent to the challenges and opportunities the financial industry faces today.”

Huffman began his career as a representative with Edward D. Jones. In 1985 he moved his financial practice to A.G. Edwards, a predecessor of Wells Fargo Advisors. He has served Ashtabula area investors since 1982. Huffman is a graduate of Indiana University and a Winner’s Circle Premier Advisor*. The Premier Advisors designation* is held by a select group of Financial Advisors within Wells Fargo Advisors and reflects a high level of

standards measured by one or more of the firm's criteria for revenue generation, educational attainment and client-service best practices.

About IMCA

Established in 1985, IMCA is a nonprofit professional association and credentialing organization with more than 9,000 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 2012, IMCA conferences and workshops hosted approximately 4,000 attendees. IMCA® and Investment Management Consultants Association® are registered trademarks of Investment Management Consultants Association Inc. CIMA®, Certified Investment Management Analyst®, CIMC®, CPWA®, and Certified Private Wealth Advisor® are registered certification marks of Investment Management Consultants Association Inc. Investment Management Consultants Association Inc. does not discriminate in educational opportunities or practices on the basis of race, color, religion, gender, national origin, age, disability, or any other characteristic protected by law. Visit www.IMCA.org for more information

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