

Designation Descriptions

AAMS®	Accredited Asset Management Specialist SM Designation granted by the College of Financial Planning.
AEP®	Accredited Estate Planner® Designation granted by the National Association of Estate Planners & Councils
AFFP®	Agriculture Focused Financial Planning® Designation granted by the University of Illinois Urbana-Champaign
APMA	Accredited Portfolio Management Advisor Designation granted by the College for Financial Planning®
AWMA®	Accredited Wealth Management Advisor SM Designation granted by the College for Financial Planning®
AIF®	Accredited Investment Fiduciary® Designation granted by Fi360
CAIA®	Chartered Alternative Investment Analyst Designation granted by the Chartered Alternative Investment Analyst Association. CAIA® is a registered certification mark owned and administered by the Chartered Alternative Investment Analyst Association.
CFA®	Chartered Financial Analyst® Designation granted by the CFA Institute. CFA® and Chartered Financial Analyst® are registered trademarks owned by CFA Institute.
CFP®	CERTIFIED FINANCIAL PLANNER™ Designation granted by the Certified Financial Planner Board of Standards Inc. Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™, CFP® (with plaque design) and CFP® (with flame design) in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements.
CGMA®	Chartered Global Management Accountant Designation granted by the Association of International Certified Professional Accountants
ChFC®	Chartered Financial Consultant® Designation granted by The American College of Financial Services
ChSNC®	Chartered Special Needs Consultant American College of Financial Services
CIMA®	Certified Investment Management Analyst® Designation granted by the Investments and Wealth Institute
CKA®	Certified Kingdom Advisor Designation is issued by Kingdom Advisors
CLU®	Chartered Life Underwriter® Designation granted by the American College of Financial Services

Designation Descriptions

CPA	Certified Public Accountant Credentials awarded by the State Accountancy Board
CPWA	Certified Private Wealth Advisor Designation granted by Investments & Wealth Institute®
CRPC®	Chartered Retirement Planning Counselor SM Designation granted by the College of Financial Planning
CRPS®	Chartered Retirement Plans Specialist SM Certification granted by the College of Financial Planning
CSA®	Certified Senior Advisor Designation granted by the Society of Certified Senior Advisors
CTFA	Certified Trust and Fiduciary Advisor Designation granted by the American Bankers Association.
CWS®	Certified Wealth Strategist® Designation granted by Cannon Financial Institute.
JD	Juris Doctor JD is an educational degree. The holder does not provide legal services on behalf of Blue Trust
MPAS	Master Planner Advanced Studies Designation granted by the College for Financial Planning®
PFS TM	Personal Financial Specialist Designation granted by the American Institute of Certified Public Accountants (AICPA)