

Steve Kennedy Earns CIMA® Designation

Albany Financial Group is proud to announce the advanced education of Steve Kennedy, Financial Paraplanner to Leonard F. Valletta, CFP®, MS. Subsequent to exhaustive hours, Steve has obtained his Certified Investment Management Analysis® (CIMA®) designation. In addition, Steve also completed his Investment Management Theory and Practice education through the Yale School of Management. These advancements help better solidify the approach Len's team is taking to construct clients' investments and makes the team more equipped than ever to meet individual investment needs.

The CIMA® designation is a compelling combination of Ivy League quality and real-world application for use with clients. Among the hundreds of financial certifications currently offered in the marketplace, very few meet national/international standards, raising concerns about consumer confidence. The CIMA® designation meets the standards of ANSI, whom provides credential validity for such organizations as the Department of Defense.

In addition to the CIMA®, Steve has over 10 years of experience in the industry which also includes his CFP® and other certifications.