

CWM Candidate Referral

Demonstrate your commitment to your credential and the Wealth Management Profession by referring a CWM candidate. Encourage your colleagues to earn the CWM certification – help them be part of a worldwide community of exceptional professionals who are raising the bar in the Wealth Management and Investment Advisory fields.

Simply provide us with the contact information for your colleague and we will send him/her the Certification Candidate Guide, the guide to the CWM® registration and certification process. When your referred colleague or staff registers for the CWM®, you will receive a complimentary \$10 Amazon.com Gift Card! Plus, we will also send a \$10 Amazon.com Gift Card to the new CWM® candidate on your behalf. Please resubmit the form to refer additional colleagues. This offer is limited to new applicants only and a maximum of five referrals per calendar year.

Nominator Contact Information (All information is required):

First Name	
Last Name	
Title	
Company	
E-Mail Address	
Phone	

I would like to send information about the CWM® Credential to the recipient listed below.
(All Information Required)

Candidate Name	
Candidate Job Title	
Candidate Company	
Candidate E-mail Address	
Candidate Address	
Candidate City	
Candidate State	
Candidate Zip	
Candidate Phone Number	

Comments or Special Instructions:

PRINT