UPCOMING WEBINAR

Financial Planning after the SECURE Act 2.0

JULY 19 1:30PM EST

Devin Ekberg

CFA®, CIMA®, CPWA®

New provisions of Secure Act 2.0 have expanded the opportunities for Americans to save for retirement. Listen to speaker David Ekberg, senior consultant of Advisor Education at PIMCO, summarize the key benefits for retirement plan participants and their beneficiaries.

Mr. Ekberg provides training to financial professionals on advanced wealth planning topics, including retirement strategies, alternative investments, and goals-based wealth management.

Prior to joining PIMCO in 2021, Mr. Ekberg was chief learning officer and managing director of professional development for the Investments & Wealth Institute (IWI), where he led the advisor education programs for advanced credentials in the financial industry. During his tenure at IWI, he oversaw the Certified Private Wealth Advisor (CPWA) certification education at the University of Chicago and led the acquisition and development of the Retirement Management Advisor (RMA) certification.

He has 18 years of investment and financial services experience and holds a master's degree from Creighton University. He is a CFA charterholder and holds the Certified Investment Management Analyst (CIMA) and CPWA designations.

Hosted by

PIMCO

Doerschler & Associates
WEALTH MANAGEMENT