



Congratulations: Two New Designations

We are pleased to announce that two Arnerich Massena professionals have earned new designations. Senior Investment Advisor Matt Sampson, CFP®, CEPA®, now adds the Certified Exit Planning Advisor credential. And Research Analyst Nick Buckley, CFA, has earned the Chartered Financial Analyst credential. Congratulations to both Matt and Nick for their achievements; read on to learn more about what these designations mean.



Matt Sampson, CFP®, CEPA®, Senior Investment Advisor

Matt recently completed the CEPA® Credentialing Program at the [Exit Planning Institute](#), passing the rigorous exam to earn his Certified Exit Planning Advisor — or CEPA® — credential. The program helps

advisors gain expertise and knowledge in the area of engaging business owners around growth and exit strategies, helping them build more valuable companies and stronger long-term financial plans.

A Certified Exit Planning Advisor can help business owners understand the value of their business, identify strategies for making it attractive and ready for an exit, explore their options for transitioning the business, and identify their personal vision and goals for the business.

The CEPA® credential will require annual ongoing continuing education to remain up to date and keep abreast of current tools and options.

Matt is excited to apply his skills and knowledge toward helping entrepreneurs make the most of the tremendous work and effort they put in to building their business, ensuring that their vision can be realized over the long term.

“Coming from a family of business owners, I’ve seen firsthand how important it is to plan for an eventual exit. Business owners often put their life’s work into growing and creating a business, taking immense pride in providing for their families and generating value for the many stakeholders involved in the success of the enterprise. Yet so many business owners wait too long to plan for their exit. Building your advisory team, managing toward growth and eventual exit, and having an understanding of one’s exit options puts business owners in a strong position, no matter what curve balls come their way.”

~Matt Sampson, CFP®, CEPA®



Nick Buckley, CFA, Research Analyst

Nick Buckley recently completed the long process of earning his Chartered Financial Analyst (CFA) designation. The [CFA Institute](#) administers the CFA program, a three-part exam that tests the

fundamentals of investment tools, valuing assets, portfolio management, and wealth planning. CFA Charterholders must pass all three rigorous exams in addition to 4,000 hours of work experience and acceptance by the CFA Institute.

The CFA designation is a globally recognized credential in the investment management profession, and CFA charterholders demonstrate knowledge and expertise in investment management, risk management, asset management, and investment research. CFA charterholders must also uphold the [CFA Code of Ethics and Standards of Professional Conduct](#), which is signed by all members annually.

The CFA program is a long process, and many candidates are not successful. Completion of the program is a testament to a candidate’s deep knowledge, proficiency, and very hard work.

The CFA designation reaffirms the dedication, skill, and expertise Nick brings to his work conducting manager research and due diligence, investment portfolio analysis, and industry analysis.

“In the several years it’s taken me to become a CFA charterholder, the process has taught me a great deal about financial concepts, perseverance, and humility, not always in that order. The hours spent working toward the charter has helped me to better understand complex and intertwined financial systems and it means a great deal to me to have earned the right to use the CFA designation.”

~Nick Buckley, CFA

