

- Textbook and academic paper editor
- Fi360 Inc. Center for Fiduciary Studies™
 - Accredited Investment Fiduciary Training-2014
 - Ongoing yearly continuing education
- FINRA Dispute Resolution
 - Arbitration training-2019

Affiliations

- CFA® Society Phoenix
- CFA® Institute
- Fi360 Inc, Center for Fiduciary Studies™
- FINRA Dispute Resolutions-Arbitrator

Not Yet Retained