

News Release

Nils Dillon Receives Certificate in Investment Performance Measurement (CIPM) Designation



RHINELANDER, WI – Heck Capital Advisors announces that Nils Dillon, Investment Performance Analyst, has earned the Certificate in Investment Performance Measurement (CIPM) professional designation from the Chartered Financial Analysts (CFA) Institute.

The CIPM program was developed to test the performance evaluation and presentation expertise of investment professionals and is the premier mark of distinction for professionals seeking to increase their mastery of performance measurement principles. The CIPM is the investment industry's only designation dedicated to the specialized field of investment performance analysis and presentation.

“Investment performance and analysis is essential in our client experience,” explains David Heck, Chief Operating Officer and Senior Director of Consulting and Planning at Heck Capital Advisors. “We are pleased that Nils has attained the CIPM designation and is representing a high standard of professional excellence.”

To earn the certificate candidates must complete two three-hour examinations covering the Global Investment Performance Standards and a globally relevant body of knowledge, including professional ethics, performance measurement, attribution and appraisal. They must also meet a work experience requirement and adhere to the CIPM Association Code of Ethics and Standards of Professional Conduct among other requirements.

Nils is a member of the Heck Capital Advisors Investment Advisory Committee and is responsible for investment and performance examinations, reporting and analysis, as well as the development of portfolio/consulting presentations. He assists with the entire performance evaluation process including performance measurement, appraisal and attribution, and performs and analyzes mutual fund searches. In addition, Nils works with numerous mutual fund companies to evaluate their due diligence process and helps in the mutual fund screening and selection process.

In addition to passing the Principles and Expert Examinations for the CIPM designation, Nils previously passed the Series 65, Uniform Investment Adviser Law Examination.

About Heck Capital Advisors

Heck Capital Advisors is an independent, top-ranked, family-owned investment management company specializing in portfolio management, consulting and planning. Heck Capital Advisors has client relationships in 32 states, providing investment management and consultation to over \$1 billion in assets.