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Srividya is the managing director of Duff & Phelps Singapore Pte Ltd. She set up American Appraisal Singapore operations in 2012, which later got acquired by Duff & Phelps, the largest global independent valuation advisory firm. Art Smith joined Crossmark in April of 2018 as Managing Director of Distribution and Marketing. Art oversees the firm's efforts to market its products to institutional investors, financial advisors and the clients they serve. Overview: A WMCP™ designee is trained to employ a goal-based process for planning and managing client wealth, create an efficient investment portfolio, evaluate financial instruments, assemble a wealth management strategy, and provide solutions for complex wealth management needs. When corporations and municipalities want to raise capital to fund their operation, they go to an investment bank for assistance. An investment banker works with these entities to underwrite, or find buyers for, securities like bonds or stock to raise the capital the organization needs.