fi360®
global fiduciary insights

About Us
fi360.com

COMPANY PROFILE

Fi360 promotes a culture of fiduciary responsibility and improves the decision making processes of investment fiduciaries. With defined Practices as our foundation, we offer training, tools, and resources in support of that mission.

The Practices are the only defined and substantiated investment fiduciary practices that are applicable to all fiduciaries (investment stewards, advisors, and managers; managers in conjunction with CEFEX).

MAJOR MILESTONES

2011 – fi360 Canada and fi360 Pacific introduced.

2011 – Seventh annual fi360 Conference held in San Antonio.

2009 – *Pensions and Investments* features fi360 Fiduciary Score with list of most used mutual funds for second consecutive year.

2009 – f360 Blog becomes the fiduciary blog of *InvestmentNews*

2007 – Partnered with New Frontier Advisors to incorporate Resampled Efficiency into asset allocation optimizer

2006 – *Financial Planning* magazine names the AIF designation one of the "Ten most wanted" designations in the financial industry.

2006 – Updated original *Prudent Investment Practices* handbook to the *Prudent Practices for Investment Fiduciaries* handbook series

2006 – The formation of CEFEX, an international joint venture formed to develop global fiduciary certification services

MANAGEMENT

CEO: Blaine F. Aikin, AIFA, CFA, CFP® *blaine@fi360.com*

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PRODUCTS & SERVICES

TRAINING – We offer training programs to improve the knowledge and practices of investment fiduciaries.

- Accredited Investment Fiduciary® (AIF®) – Designation-level course focused on improving the policies and procedures of investment fiduciaries.
- Accredited Investment Fiduciary Analyst™ (AIFA®) – Designation-level course focused on assessment procedures for measuring conformance to a fiduciary standard of excellence.
- Fiduciary Essentials – Introductory-level course on the basis for and benefits of defined fiduciary standards.

TOOLS – We develop advanced, web-based technology to support the decision-making process of investment fiduciaries. Available products and services include the fi360 Toolkit for Advisors, fi360 Toolkit for Service Providers, data licensing, custom reporting and due diligence, with available features including:

- My Client Manager
- Investment Analyzer (with fund, manager and annuity data)
- fi360 Fiduciary Score™ Analysis
- IPS Generator
- Proposal Generator
- Asset Allocation Optimizer
- fi360 Fund Family Fiduciary Rankings™

RESOURCES – We are the go-to source for the collective knowledge and ongoing support of the investment fiduciary community.

- fi360 Conference
- fi360 Blog
- Webinars
- Social media on Twitter and LinkedIn
- Document downloads
- Fiduciary publications
- Article Competition
- Advocacy