

NEWS RELEASE



Center for FIDUCIARY STUDIES

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FOR IMMEDIATE RELEASE

Financial Industry Educators to Launch New Professional Designation

Pittsburgh, PA, July 20, 2004—The **Center for Fiduciary Studies** (Center) is joining with **Cannon Financial Institute** (Cannon) to launch a new professional designation, **Accredited Fiduciary Investment Manager™ (AFIM)**. Both organizations are highly regarded industry leaders in financial services education and training—the Center for its courses on investment fiduciary responsibility, and Cannon for its wealth and investment management, trust, private banking, and sales and relationship management curricula.

The new AFIM designation provides the banking and trust markets with an advanced certification program for staff members who deliver investment advisory services. The AFIM designation can initially be earned only by those who have successfully completed Cannon's rigorous three-year investments curriculum and who have passed a comprehensive final exam. The curriculum covers:

- Trust laws and regulations
- Investment fiduciary practices
- Financial, estate, and tax planning
- Portfolio management
- Trust administration and recordkeeping
- Retirement plans, planning, and IRA rollovers
- Insurance planning

The AFIM courses will be offered at university and conference center training sites around the country and will be taught by faculty from both the Center and Cannon.

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The AFIM program will be the Center's third professional designation—the other two designations are **AIF**[®] (Accredited Investment Fiduciary) and **AIFA**[®] (Accredited Investment Fiduciary Auditor).

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*About the **Center for Fiduciary Studies**: The Center was established in 1999 in association with the **University of Pittsburgh's Center for Executive Education** at the **Joseph M. Katz Graduate School of Business**. To date, more than 2,000 professionals have completed training at the Center, and more than 600 graduates have gone on to earn either the **AIF** or **AIFA** designations. The Center is part of the trilogy of organizations that make up **Fiduciary 360** (www.fi360.com). The other associated organizations include the **Foundation for Fiduciary Studies** and **Fiduciary Analytics**.*

*About **Cannon Financial Institute** (www.cannonfinancial.com): Cannon Financial Institute, founded in 1961, is the nation's leading consulting, training and coaching firm for providers of wealth and investment management, trust, retirement plan, private banking, brokerage and insurance services. Tens of thousands of financial services professionals have been trained by Cannon over the past 43 years. The company is headquartered in Athens, Georgia.*

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