



fi360 Trademark and Copyright Guidelines

Fi360’s vision is to build a community committed to standards of fiduciary excellence. Our trademarks and copyrighted materials represent our most valuable commodities in attempting to build that community. It is of the utmost value to us, our designees, and our subscribers that our trademarked and copyrighted materials are always presented in a uniform and properly attributed manner. This document contains instructions on how to properly use and attribute fi360 intellectual property, ensuring consistency of our brand and strengthening our position as the leader in global fiduciary insights.

fi360 Trademarks

Our trademarks identify and distinguish our services as uniquely ours. The following table lists the most current information on fi360 trademarks in the United States and other countries. You may use these trademarked terms to refer to fi360 products and services. Be sure to be accurate in your descriptions of these trademarks and use the appropriate trademark symbol on first reference within a document and on each individual URL of a webpage. Subsequent references within the same document do not require the trademark symbol.

The absence in this list of any service, product, or other name used by fi360 does not constitute a waiver of any intellectual property rights established by fi360.

Trademark	Status	Use
Accredited Fiduciary Investment Manager	®	Adjective, used to describe a training program, professional designation, or accredited designee
Accredited Investment Fiduciary	®	Adjective, used to describe a training program, professional designation, or accredited designee
Accredited Investment Fiduciary Analyst	™	Adjective, used to describe a training program, professional designation, or accredited designee
AFIM	™	Adjective, used to describe a training program, professional designation, or accredited designee
AIF	®	Adjective, used to describe a training program, professional designation, or accredited designee
AIFA	®	Adjective, used to describe a training program, professional designation, or accredited designee



Trademark	Status	Use
fi360	®	Adjective or noun, company name and descriptor of proprietary products, services, and intellectual property
fi360 Fiduciary Score	TM	Noun, the quantitative score given to various investment options based on a fiduciary due diligence process
Fiduciary360	®	Adjective or noun, company name and descriptor of proprietary products, services, and intellectual property
fi360 Australasia	TM	Adjective or noun, company name and descriptor of proprietary products, services, and intellectual property in Australia and New Zealand

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Questions

If you have any further questions about the trademarks and copyrights of fi360, please contact standards@fi360.com.