

Our Mission



Fi360 offers a full circle approach to investment fiduciary education, practice management, and support that has established us as the go-to source of investment fiduciary insights.

Our mission is to promote a culture of fiduciary responsibility and improve the decision making processes of investment fiduciaries. With defined Practices as our foundation, we offer Training, Tools, and Resources in support of that mission.

Fiduciary Training

AIF® - Instructs investment fiduciaries on how to fulfill their duties to a defined standard of care. Participants will be able to identify when an individual or organization may be deemed to have fiduciary status, identify the legal standards that require fiduciaries to prudently manage investment decisions, apply the Practices that define a prudent process for investment stewards and advisors, and strengthen their policies and procedures. Culminates in earning the Accredited Investment Fiduciary® professional designation.

AIFA® - Instructs participants on how to assess conformance to a Global Fiduciary Standard of Excellence using an ISO-like assessment process. Participants will be able to conduct formal assessments of the fiduciary practices of investment stewards, advisors, and managers as consulting and/or CEFEX Certification engagements. Culminates in the Accredited Investment Fiduciary Analyst® professional designation.

Fiduciary Tools

Web-based software to help investment fiduciaries manage their responsibilities.

fi360 Fiduciary Score™ - The establishment and consistent application of a due diligence process for investment selection is not only prudent, but also required by law.

Monitoring Reports – The most costly and important step of the fiduciary process is the ongoing monitoring of investment managers (mutual funds, separate accounts, ETFs).

Investment Policy Statement Generator – The preparation and maintenance of the IPS is one of the most critical functions of an investment fiduciary.

Fiduciary Resources

The fi360 Blog, Webinars, articles database, national conference, insights and more.