About Us

COMPANY PROFILE

fi360 helps its clients gather, grow, and protect assets through better investment and business decision-making. Since 1999, fi360 has been providing innovative solutions to financial services providers, including the AIF® and AIFA® designation programs, the fi360 Toolkit™ software, and fi360 Fiduciary Score®. Our vision is to be the leading provider of services that raise the level of professionalism in investment management.

With extensive education, certification, software, and practice management offerings, fi360 is a one-stop shop equipped to provide individuals and organizations with the training, tools, and resources necessary to become more successful.

MAJOR MILESTONES

2014 - 10th annual Insights Conference held in Nashville.
2013 - Acquisition of *Ann Schleck and Co., IPS AdvisorPro,* and *Financial Service Standards*.
2013 - Second major revision completed to *Prudent Practices* and fiduciary handbooks.
2011 - fi360 Canada and fi360 Pacific introduced.
2006 - *Financial Planning* magazine names the AIF designation one of the "Ten most wanted" designations in the financial industry.
2006 - CEFEX, an international joint venture, is formed to develop global fiduciary certification services.
2003 - AIF Designation launched. First training program held in October at the University of Pittsburgh.
2003 - *Prudent Investment Practices*, the original fiduciary handbook is co-published with the *AICPA*.
1999 - Company founded to provide training and develop software to help financial service providers succeed.

MANAGEMENT

Blaine F. Aikin, AIFA®, CFA, CFP®.............Chief Executive Officer
J. Richard Lynch, AIFA®...President
Robert DiMaggio...Chief Product Officer
William Mueller...Chief Finance Officer
Kenneth S. Robb.....................................Chief Technology Officer
Matthew Wolniewicz...................................Chief Revenue Officer

CAPABILITIES

Training & Designations

We offer advanced-level training leading to professional certification:

- Accredited Investment Fiduciary® (AIF®)
- Accredited Investment Fiduciary Analyst® (AIFA®)

We offer essentials training programs that provide overviews of fiduciary roles and responsibilities and managing the investment process:

- Fiduciary Essentials for Investment Advisors
- Fiduciary Essentials for Investment Stewards
- Fiduciary Implications of Financial Planning

Investment & Client Management Technology

We develop advanced, web-based software and analytics to assist in the delivery of a prudent investment management process:

- fi360 Toolkit®
- fi360 Fiduciary Score®
- IPS AdvisorPro™

Strategic Growth Support

We offer strategic growth solutions for retirement professionals through the services of Ann Schleck & Co:

- Research & Benchmarking
- Sales & Practice Management Training
- Marketing Creative Agency

Fiduciary Assessments

Through CEFEX, fi360 is able to offer certification programs for organizations that meet a fiduciary best practices standard:

- Available for advisors, stewards, managers, record-keepers, service providers, and investment support services organizations
- ISO principles
- Independent review

Practice Management & Compliance

Financial Service Standards (FSS) is an fi360 company that offers training and tools to help retirement professionals run highly successful and compliant practices.

- Professional Plan Consultant (PPC) Training & Designation
- 401(k) Service Solution Document Library

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