

## Company profile: Center for Fiduciary Studies

The Center for Fiduciary Studies is the training portion of Fiduciary360. It was established in 1999 to provide the investment industry with the first full-time training and research facility focused exclusively on investment fiduciary responsibility and portfolio management. The training programs and professional designations are based on the practice standards of care developed by the Foundation for Fiduciary Studies.

The Center has developed two curriculums and accompanying designations:

**Accredited Investment Fiduciary® (AIF®)** – Our AIF training program 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.

**Accredited Investment Fiduciary Analyst™ (AIFA®)** - Our AIFA training program 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. AIF training is available in a classroom setting, as a Web-based program, or in custom formats to suit the needs of different organizations. AIFA training is available in both a classroom setting or in custom formats. Successful completion of the programs results in the corresponding professional designation signifying competence in the curriculum.

The Center also provides a number of other benefits for our professional designees:

- Continuing education: CE is produced in-house and is made available as part of designation dues.
- CE-in-a-Box: Designees have exclusive access to this tool, allowing them to give presentations on Global Fiduciary Standards of Excellence good for CE from CFP®, CPA, and more.
- Discounts on fi360 services and products: Designees receive discounts on Fiduciary Store items, annual conference registrations, and Fiduciary Analytics tools.

### Contact information:

For inquiries relating to fiduciary training, please send emails to [training@fi360.com](mailto:training@fi360.com).