



# 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 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.

## Executive Leadership

Blaine F. Aikin, AIFA®, CFA, CFP®  
Chief Executive Officer

J. Richard Lynch, AIFA®  
President

William Mueller  
Chief Operations Officer

Kenneth S. Robb  
Chief Technology Officer

Ann Schleck  
Principal at Ann Schleck & Co.

Matthew Wolniewicz  
Chief Revenue Officer

## Capabilities

We offer advanced-level training leading for financial services professionals:

- Accredited Investment Fiduciary® (AIF®)
- Accredited Investment Fiduciary Analyst® (AIFA®)
- Professional Plan Consultant™ (PPC™)
- Fiduciary Essentials for DC Plans

## 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