

# ★ ★ ★ ★ ★ Fi360 ★ ★ ★ ★ ★ CONFERENCE

APRIL 3RD - 5TH 2019 NASHVILLE, TN

**Rich Lynch,**  
Director, Fi360



Rich joined in 1999 as one of the initial executives and currently serves as a Director of Fi360. As a member of the Board he oversees the strategic direction of the organization, specifically with respect to fiduciary developments and their impact on the financial services industry and Fi360. He is also a member of the CEFEX – Centre for Fiduciary Excellence Board of Directors and CEFEX Registration Committee.

In 1999 Rich began work on one the financial industry's most widely-recognized fiduciary publications, *Prudent Practices for Investment Fiduciaries*. He co-authored the first published edition in 2003 and continues to be instrumental in updating the handbook series periodically as regulatory and market developments dictate.

As the longest tenured instructor of Fi360 training, Rich has trained and advised thousands of financial advisors on fiduciary matters. He is instrumental in providing investment education and training programs that award the Accredited Investment Fiduciary® (AIF®) and Accredited Investment Fiduciary Analyst® (AIFA®) professional designations. As a CEFEX Registration Committee member, he oversees and approves the assessment and certification of all CEFEX-certified firms.

Rich graduated from the United States Coast Guard Academy with high honors in economics-management, where he received the Superintendent's Award for leadership at graduation. During his twenty-year Coast Guard career, he served aboard three ships as Operations Officer, Executive Officer and Commanding Officer respectively. In addition, he held various senior-level financial management positions, including an assignment to the National Pollution Funds Center, a newly-established Coast Guard unit responsible for managing the \$1 billion Oil Spill Liability Trust Fund. Rich received his MBA degree (magna cum laude) with an emphasis in operations research from George Washington University.