fi360® global fiduciary insights

YOUR GUIDE TO GLOBAL FIDUCIARY INSIGHTS

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Blaine Aikin is the Chief Executive Officer of fi360. Fi360 is a national and international leader in the field of investment fiduciary responsibility, providing training, Web-based analytical tools, and resources for those who manage money on behalf of others. He is the author of numerous articles on the subjects of fiduciary responsibility and investment management, and the author of the monthly Fiduciary Corner column in InvestmentNews magazine.

Blaine received his Master of Public Management and Policy degree from the Heinz School of Carnegie-Mellon University. Upon graduation from CMU, he was selected for the prestigious Presidential Management Intern Program which involved management assignments in the U.S. Department of Treasury and the U.S. Senate. He subsequently served as Budget Officer for Prince William County, Virginia. Blaine then entered the private sector in professional financial management. He earned the Certified Financial Planner (CFP) and Chartered Financial Analyst (CFA) designations and served as a principal and Chief Investment Officer of Allegiance Financial Advisors. After providing contract training and consulting services for PNC Financial Services Group, Blaine became a Senior Vice President and Director of Product Development and Management for PNC Advisors. For several years, he also served as an adjunct faculty member of the College for Financial Planning; providing instruction in investment planning and other subjects leading to the Certified Financial Planner designation.

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Rich Lynch is the COO of Fiduciary360, which delivers training, tools and resources for investment fiduciaries. As one of the main instructors for fi360 Training, 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. He also provides oversight to fi360 Tools, which has developed sophisticated Web-based tools and reporting, including the innovative Fiduciary Score™ and the Fund Family Fiduciary Rankings™ for trustees and investment professionals.

Rich assisted with the development of the industry's fiduciary handbook series, Prudent Investment Practices.

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 Master's of Business Administration degree (Magna Cum Laude) with an emphasis in Operations Research from George Washington University.