



**The more fully you embrace the fiduciary role, the less onerous the rules, the lower the risks, the higher the rewards.**

**AIF program participants come from a variety of professions, including:**

- Investment advisors
- Broker/Dealers
- Money managers
- Accountants
- Attorneys
- Investment committee members for retirement plans, foundations and endowments
- Investment consultants
- Trustees of private trusts

Testimonials:

*"Finally, there is a standard to adhere to and measure by to distinguish between gut feeling and process and procedures."*

*"I found it informative and enlightening. I am seriously considering this as a means of going out on my own."*

*"The AIF program presented a complete process to a perplexing problem."*

## **Accredited Investment Fiduciary® (AIF®): Training and Professional Designation**

### Overview

A "fiduciary" is someone who is managing the assets of another person and stands in a special relationship of trust, confidence, and/or legal responsibility. A fiduciary is required by law to always act in the best interests of his/her client, beneficiary, or retirement plan participant. Yet many fiduciaries are not aware of their duties and responsibilities, let alone educated on how to fulfill those duties to the standard of care required by law.

AIF training equips investment fiduciaries and professionals to easily and effectively implement a prudent investment process—a fundamental concept that is vital for every fiduciary to master in order to successfully fulfill their legal responsibilities and demonstrate commitment to acting in the best interests of those they serve.

### Training

The AIF Program is advanced level training designed to provide a unique comprehensive overview of the following areas:

- Prudent Practices for Investment Fiduciaries
- Step-by-step system for standardizing the investment process
- Asset allocation
- Preparation of investment policy statements
- Manager search and due diligence
- Performance measurement
- and other related subjects.

### Designation

The AIF professional designation is the first and only designation that demonstrates knowledge and competency in the area of fiduciary responsibility and communicates a commitment to standards of investment fiduciary excellence.

So, whether you are an advisor looking to fulfill your own fiduciary obligation as well as assist your fiduciary clients in navigating their role, or an individual transitioning from a broker-dealer business model to an advice model, or someone quite simply looking for the training and tools that demonstrate a high level of commitment to professional and fiduciary excellence, the AIF professional designation will equip you with the following major deliverables:

- Trustworthy investment process
- Effective compliance & risk management
- Cutting edge training, tools, & support
- Client centric marketing message
- Clear differentiation from the competition

### Available Training Options

The AIF program is offered in two formats, each culminating with the accreditation exam for the AIF professional designation:

1. Web-based
2. Capstone (blended online training with a day of face to face instruction)  
You may enroll individually or request information to schedule a "Custom," private, on-site Capstone course for your group.