

YOU KNOW YOUR CREDENTIALS ARE IMPECCABLE.



BUT HOW CAN YOU PROVE IT TO YOUR CLIENTS?

About CEFEX

CEFEX is an independent assessment and certification organization. CEFEX provides comprehensive assessments as measures of risk and trustworthiness of investment fiduciaries.

A CEFEX assessment includes both on and off-site confidential reviews of an organization's practices by an independent analyst. The process uses the ISO 19011 audit standard, an internationally recognized standard for testing process management systems.

In an environment of investor anxiety, retirement plan sponsors, endowments, foundations, personal trusts and investors are looking for standards that can offer support for a fiduciary's integrity. Conversely, fiduciaries are looking for a way to show investors that their trust is warranted. That's why the Centre for Fiduciary Excellence, CEFEX, has introduced the CEFEX Seal of Excellence.

CEFEX, an independent global organization, offers an assessment and certification process to provide recognition of a fiduciary's conformity to a defined set of best practices. Fiduciaries who meet these rigorous criteria qualify to display the CEFEX Seal of Excellence.

Whether you're an investment advisor, manager or trustee, the CEFEX Seal of Excellence provides a way to quickly show investors that your practices are impeccable.

To learn more about CEFEX and the certification process, contact us today. Please call Carlos Panksep at 416-401-8702, or e-mail admin@cefex.ca. To perform an on-line self-assessment of your firm's readiness for certification, visit www.cefex.ca

CEΦEX
CENTRE FOR FIDUCIARY EXCELLENCE

CEFEX has over 200 years of standards development and management systems registration experience through its founding members:

