

## **ANNOUNCEMENT**

### **CEFEX RENEWS 29 CERTIFICATIONS**

**PITTSBURGH, April 10, 2018**

I am pleased to announce that CEFEX has renewed the registrations for the following firms over the past quarter:

Kidder Benefits Consultants, Inc. of West Des Moines, IA: ERISA 3(16) Services  
Mariaca Wealth Management, LLC of Lake Worth, FL: Investment Advisor  
The Connestoga Group, Inc. of Frazer, PA: Investment Advisor  
North American KTRADE Alliance, LLC of Plymouth, IN: ASPPA Recordkeeping Services  
Niles Lankford Group Inc. of Plymouth, IN: ASPPA Administration Services  
Rutherford Rede Limited of Auckland, New Zealand: Investment Advisor  
Cetera Retirement Plan Specialists of Walnut Creek, CA: ASPPA Administration Services  
Wabash Capital of Terre Haute, IN: Investment Advisor  
Petersen Hastings Investment Management of Kennewick, WA: Investment Advisor  
Resource Consulting Group, Inc. of Orlando, FL: Investment Advisor  
Securian Retirement of St. Paul, MN: Registered Opinion Letter  
Bronfman E.L. Rothschild of Madison, WI: Investment Advisor  
Benefit Plans, Inc. of Omaha, NE: ASPPA Administration Services  
Satis Asset Management Limited of London, United Kingdom: Investment Advisor  
Capital Partners Consulting Pty Ltd of Perth, Western Australia: Investment Advisor  
intelligents Investment Solutions, Inc of Albert Lea, MN: Investment Advisor  
Retirement Strategies, Inc. of Augusta, GA: ASPPA Administration Services  
Benefit Planning Consultants, Inc. of Champaign, IL: ASPPA Administration Services  
Cornerstone Capital Advisors, Inc. of Uniontown, OH: Investment Advisor  
Archford Capital Strategies of Swansea, IL: Investment Advisor  
The Centurion Group of Plymouth Meeting, PA: Investment Advisor

Qualified Plan Solutions, LC of Colwich, KS: ASPPA Administration Services  
Bolton Partners Investment Consulting Group, Inc of Baltimore, MD: Investment Advisor  
The Laborers' Local 1298 Pension Fund of Hempstead, NY: Investment Steward  
Chairvolotti Financial of Winter Park, FL: Investment Advisor  
BAC Capital Advisors, LLC of Seattle, WA: Investment Advisor  
Blue Ridge ESOP Associates of Charlottesville, VA: ASPPA Administration Services  
Aspire Financial Services, LLC of Tampa, FL: ASPPA Recordkeeping Services  
Business Financial Group, LLC of San Antonio, TX: Investment Advisor

These firms continue to lead by adhering to best practices in fiduciary excellence. They voluntarily undertake annual independent assessments.



*The CEFEX Certification Marks*

Congratulations to all firms!

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### **About CEFEX:**

CEFEX, Centre for Fiduciary Excellence, LLC, a Fi360 company, is an independent certification organization. CEFEX works closely with industry experts to provide comprehensive assessment programs to improve the fiduciary practices of investment stewards, advisors, recordkeepers, administrators and managers.

CEFEX conducts assessments according to the principles of the international standard ISO/IEC 17021.

Observance of these principles is intended to ensure that CEFEX operates in a competent, consistent and impartial manner, thereby facilitating the recognition of CEFEX and the acceptance of its certifications on a national and international basis. The ISO 17021 standard serves as a foundation for facilitating the recognition of CEFEX certification in the interests of national and international trade.

Certification provides independent demonstration that the management system of the organization:

- conforms to specified requirements described within a standard,
- is capable of consistently achieving its stated policy and objectives, and
- is effectively implemented.

The assessment thereby provides value to the organization, its customers and interested parties. The overall aim of certification is to give confidence to all parties that a management system fulfills specified requirements. The value of certification is the degree of public confidence and trust that is established through an impartial and competent assessment by a third-party. Parties that have an interest in certification include, but are not limited to:

- Certification bodies,
- The customers of the certified organizations,
- Governmental authorities,
- Self-regulatory organizations, and
- Consumers and other members of the public

**About Fi360®:**

*Fi360, a fiduciary education, training and technology company, helps financial intermediaries use prudent fiduciary practices to profitably gather, grow and protect investors' assets. Since 1999, the firm has provided financial professionals with the tools necessary to act as a fiduciary in their work with investors. Headquartered in Pittsburgh, PA, Fi360 is the home of the Accredited Investment Fiduciary® (AIF®) designation, the Fiduciary Focus Toolkit™ and the Fi360 Fiduciary Score®. Fi360 is also the parent company of CEFEX. Learn more at [www.Fi360.com](http://www.Fi360.com), via [Twitter](#) or on [LinkedIn](#)*

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