

**NEWS RELEASE**

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**INVESTMENT ADVISOR IS CERTIFIED FOR FIDUCIARY EXCELLENCE**

**BRIDGEVILLE, FEBRUARY 8, 2016** – CEFEX, the Centre for Fiduciary Excellence, LLC, an fi360 company, has certified Bronfman E.L. Rothschild, of Madison, Wisconsin to the standard described in the handbook “Prudent Practices for Investment Advisors”. Bronfman E.L. Rothschild (Bronfman) joins the elite group of Investment Advisors to successfully complete the independent certification process.

The standard describes how an Investment Advisor assumes the responsibility for managing a client’s overall investment management process, which includes the selection, monitoring and replacement of investment managers, as well as developing processes to implement investment strategies and fiduciary practices on an ongoing basis. According to the General Manager of the Centre for Fiduciary Excellence, Carlos Panksep, “Through CEFEX’s independent assessment, the certification provides assurance to investors, both institutional and individual, that Bronfman has demonstrated adherence to the industry’s best fiduciary practices. This indicates that Bronfman’s interests are aligned with those of investors.”

Bronfman E.L. Rothschild has been certified for providing RIA advisory services for defined contribution & defined benefit retirement plans. The annual certification process involves a detailed assessment of operational data and procedures, followed by on-site interviews with key personnel. Bronfman is registered at [www.cefex.org](http://www.cefex.org), where its certificate can also be viewed.

The standard is substantiated by legislation, case law and regulatory opinion letters from the Employee Retirement Income Security Act (ERISA), the Investment Advisor’s Act of 1940, Uniform Prudent Investor Act (UPIA), Uniform Prudent Management of Institutional Funds Act (UPMIFA) and the Uniform Management of Public Employee Retirement Systems Act (MPERS) in the U.S.

A full copy of the standard can be downloaded from CEFEX at [www.cefex.org](http://www.cefex.org) and a summary can be viewed by clicking on Bronfman’s on-line CEFEX certificate. More information about Bronfman is available at [www.belr.com](http://www.belr.com).

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**About CEFEX:**

*CEFEX, Centre for Fiduciary Excellence, LLC, an 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 has offices in Pittsburgh, PA and Toronto, Canada.*

**About fi360:**

*fi360’s mission is to help institutions and advisors gather, grow, and protect assets through better investment and business decision-making. fi360’s capabilities include professional development, software applications, and research and practice management. fi360 is the home of the AIF<sup>®</sup> designation and the fi360 Toolkit<sup>®</sup>, and is the parent company of Ann Schleck & Co., CEFEX, and IPS AdvisorPro. For more information about fi360, please visit [www.fi360.com](http://www.fi360.com).*