

FOR IMMEDIATE RELEASE

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**INVESTMENT ADVISOR IS CERTIFIED FOR
FIDUCIARY EXCELLENCE**

PITTSBURGH, April 15, 2014 – CEFEX, the Centre for Fiduciary Excellence, LLC, has certified Case Pearlman Retirement Plan Advisors, LLC of Fort Myers, FL to the standard described in the handbook “Prudent Practices for Investment Advisors”. Case Pearlman Retirement Plan Advisors, LLC (Case Pearlman) 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 de-selection 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 Case Pearlman has demonstrated adherence to the industry’s best fiduciary practices. This indicates that Case Pearlman’s interests are aligned with those of investors.”

Case Pearlman has been certified for investment fiduciary services for retirement plan clients serving as an ERISA 3(21) investment advisor and/or an ERISA 3(38) investment manager. The annual certification process involves a detailed assessment of operational data and procedures, followed by on-site interviews with key personnel. Case Pearlman is registered at 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), 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 and a summary can be viewed by clicking on Case Pearlman’s on-line CEFEX certificate. More information about Case Pearlman Retirement Plan Advisors, LLC. is available at www.casepearlman.com.

About CEFEX:

CEFEX, Centre for Fiduciary Excellence, LLC 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.