

# About fi360

**fi360 helps financial intermediaries use prudent fiduciary practices to profitably gather, grow, and protect investors' assets. Since 1999, fi360 has been providing innovative solutions to financial services providers, including the AIF<sup>®</sup> and AIFA<sup>®</sup> designation programs, the fi360 Toolkit<sup>™</sup> software, and fi360 Fiduciary Score<sup>®</sup>.**

With extensive education, certification, software, and practice management offerings, fi360 is a one-stop shop equipped to provide individuals and organizations with the training, tools, and resources necessary to become more successful.

**Our vision:** All investors' wealth and retirement accounts managed with a fiduciary standard of care.

**Our mission:** To help financial intermediaries use prudent fiduciary practices to profitably gather, grow, and protect investors' assets.

**Our values:** fi360 believes that, as individuals and collectively as an organization, we must demonstrate the following values in our actions:

- Responsibility – We are obligated to our clients, our co-workers, our shareholders, the community, and society.
- Excellence – Give our best effort and never compromise fiduciary aspects of the quality of all of our products - excellence in product and service delivery.
- Integrity – Be honest, fair, and accountable.
- Client service – Exceed the expectations of those we serve.
- Collaboration – Our collective achievements exceed the sum of our individual efforts.
- Knowledge – Seek continual improvement and professional development.
- Security – reliability/dependability