

PRESS RELEASE

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FOR IMMEDIATE RELEASE

**Innovest Appointed as Qualified Training Organization
for Registered Fiduciary™ Designation by Dalbar, Inc.**



Innovest Portfolio Solutions, LLC has been appointed as a Qualified Training Organization (QTO) to provide training for fiduciaries that seek the RF™ designation. A QTO delivers the required training and continuing education to trustees to obtain and maintain the [Registered Fiduciary™ \(“RF™”\) designation](#). The Registered Fiduciary designation is based on the 2010 Fiduciary Standards of the [Foundation for Fiduciary Studies](#) and validated by [Dalbar, Inc.](#), an independent expert. The Registered Fiduciary™ or RF™ designation identifies individuals and organizations as competent fiduciaries that have achieved pertinent educational qualifications and licenses, learned required skills, and have passed a background check.

“At a time when the public concern has been elevated by years of financial excesses and scandals, the RF™ validation process offers a wonderful training opportunity for fiduciaries and gives them an accreditation that will become the standard for all fiduciaries,” said Rich Todd, Managing Principal. “We have been educating client trustees on their fiduciary responsibilities and a sound prudent process since our inception and we are pleased to provide this training to all trustees in the region.”

Innovest is an independent provider of investment related consulting services to trustees, fiduciaries, and plan sponsors. Innovest works on a fee-only basis and believes there is an inherent conflict of interest if the organization which provides advice also receives remuneration from investments or providers used as a result of that advice. Innovest has been providing investment consulting services for over 14 years and currently consults to 82 institutional clients with total assets approaching \$4 billion. In addition to significant investment expertise, Innovest has a deep, focused team of professionals to drive the best solutions to their clients. For more information, go to www.innovestinc.com.

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The Foundation for Fiduciary Studies is a not-for-profit (501(c)(3)) organization established in September of 2000 to develop and advance standards of care for investment fiduciaries, which includes trustees, investment committee members, brokers, bankers, investment advisers, money managers, etc. The Foundation is independent of any ties to the investment community and therefore positioned to be a crucible for advancing fiduciary standards throughout the industry and to the public.

DALBAR, Inc. is the financial community’s leading independent expert for evaluating, auditing and rating business practices, customer performance, product quality and service. Launched in 1976, DALBAR has earned the recognition for consistent and unbiased evaluations of investment companies, registered investment advisers, insurance companies, broker/dealers, retirement plan providers and financial professionals. DALBAR awards are recognized as marks of excellence in the financial community.