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**FIDUCIARY360'S ENHANCED ANALYTICAL AND REPORTING SOFTWARE  
LETS USERS CREATE HIGHLY CUSTOMIZED DUE DILIGENCE REPORTS  
*Resampled Efficiency™ and Other New Features Added in Response to Customer Needs***

**PITTSBURGH – April 28, 2008 – [Fiduciary360](#) (fi360) has released its much anticipated [Platinum Toolkit](#), the next-generation version of its Web-based, analytical and reporting software for investment professionals. The highly regarded software provides users with the greatest measure of flexibility yet, arming advisors with the tools they need to adhere to the global fiduciary standards of excellence published in Fiduciary360's fiduciary handbook series. While fi360's [Fiduciary Score](#) gives an independent evaluation of how well a fund meets a minimum set of due diligence criteria, Platinum Toolkit users now have the ability to choose from numerous data fields to evaluate funds according to the criteria *they* feel is most meaningful – in essence, creating their own Fiduciary Scores. In addition to the full slate of tools available to all subscribers (Silver, Gold and Platinum), the Platinum Toolkit offers the ability to customize the FINRA-reviewed monitoring reports and create investment policy statements; both employ custom due diligence criteria and utilize an easy-to-use proposal generator.**

Fi360's asset allocation optimizer now also includes the only provably effective portfolio optimization procedure in the world, the patented [Resampled Efficiency™](#) technique and risk return estimates from [New Frontier Advisors](#) (NFA). Incorporating NFA's processes into the fi360 asset allocation optimizer allows for more realistic use of investment information and results in more effective asset allocations than comparable modern portfolio tools. Resampled Efficiency has outperformed current optimizers in rigorous testing and addresses the limitations of traditional asset allocation tools by statistically treating risk-return estimates consistent with investor uncertainty.

"The reporting enhancements of the Platinum toolkit really add efficiencies at quarter-end when you need them the most," said Monica M. Garver, CPA, CFP®, AIF®, head of the Investment committee at PrimeSOLUTIONS Advisors, LLC, a Pittsburgh-based RIA firm, who upgraded to the Platinum Toolkit from previous versions. "The Proposal Generator is an efficient tool to quickly show the benefits of using a Prudent Fiduciary Process, and the ability to compare and contrast the current vendor with a proposed vendor is a powerful tool for both the advisor and the committee/fiduciary. They level the playing field and the Fiduciary Scores speak for themselves."

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Fi360 Tools are organized using the updated My Client Manager interface, which allows users to flow data through all four steps of the standard investment management process: organize, formalize, implement and monitor. Starting with the input of basic information about the client, advisor and related parties to creating the optimal asset mix and investment policy statement (IPS); to the selection of investment vehicles and the ongoing monitoring of those investments, data is integrated seamlessly between tools to reduce errors and increase efficiency in managing the investment process. In addition to improvements in the customization options and user-friendliness of fi360 Tools, the recent enhancements offer improved results.

“A central goal of the fi360 Tools is to provide investment professionals with the software needed to deliver clients a fiduciary standard of care, such as that which is taught in fi360’s AIF and AIFA training programs,” said Andy Frommeyer, director of product development & management. “What we’ve also been able to accomplish through home-grown initiatives and partnerships, such as our partnership with New Frontier Advisors, is the establishment of a full suite of tools that deliver on many of the industry’s best practices.”

Annual pricing for the fi360 Toolkits is \$675 for the Silver Toolkit, \$975 for Gold and \$1,375 for Platinum. Discounts are available for fi360 AIF and AIFA designees. Monthly and quarterly subscriptions are also available.

### **About fi360**

Fi360 promotes a culture of fiduciary responsibility and improves the decision making processes of investment fiduciaries – individuals who manage money for others. It delivers training, tools and resources through the Center for Fiduciary Studies and Fiduciary Analytics, which license the Prudent Practices for Investment Fiduciaries from the Foundation for Fiduciary Studies. Through the Center, fi360 provides investment education and training programs and awards the Accredited Investment Fiduciary® (AIF®) and Accredited Investment Fiduciary Analyst™ (AIFA®) [professional designations](#). Its Fiduciary Analytics division develops sophisticated Web-based tools and reporting, including the innovative Fiduciary Score™ and the Fund Family Fiduciary Rankings™ for trustees and investment professionals. For more information, visit [www.fi360.com](http://www.fi360.com).

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### **EDITOR’S NOTE: Media are invited and encouraged to review the fi360 Tools.**

Media interested in a demonstration of the Platinum Toolkit or an interview with Andy Frommeyer, director of product development and management, should contact Ben Aikin at fi360 at 412-741-8140, Ext. 207 or [ben@fi360.com](mailto:ben@fi360.com)