



## 401(k) RF™ delivers...

- ERISA Compliant Credentials to meet fee disclosure requirements
- Positioning as Full Time Fiduciary to Boldly advertise your fiduciary role
- Robust up to date 401(k) Curriculum including latest DoL regulations
- Authorization to Use Resources of Fiduciary Standards Board
- ERISA Help Desk for routine questions
- Access to ERISA Expertise for complex issues

## Can You Qualify for RF™ ?

- Full Time Fiduciary Commitment
- Experienced 401(k) Professional
- Qualified Training or Self Study
- Avoid Conflicts of Interest
- Clear Regulatory Record

## What RF™ Means for Your Practice

- **Client Retention**... No threat from fee disclosure
- **Business Growth**... From plans with part time fiduciaries
- **Promotion**... Attract clients seeking Registered Fiduciaries
- **Differentiation**... RF™ is uncompromised and high quality

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Call 617-723-6400 or e-mail [RF@DALBAR.COM](mailto:RF@DALBAR.COM)

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## *About RF™*

The Registered Fiduciary (RF™) certification indicates a professional commitment to acting in the best interest of clients by adopting a fiduciary standard of conduct.

Professionals are trained by qualified training organizations or through self study to meet and exceed fiduciary laws and regulations.

The RF™ is the only certification that requires professionals to have achieved pertinent educational qualifications and licenses, learned essential skills, and have passed a background check.

The RF™ certification is authorized by the Fiduciary Standards Board and meets the high standards required by that Board.

## *About DALBAR*

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.

## *About the Fiduciary Standards Board*

The Fiduciary Standards Board was formerly known as the Foundation for Fiduciary Studies and is a not-for-profit organization established in 2000. The Fiduciary Standards Board's mission is to:

1. Develop and maintain up-to-date fiduciary standards; and
2. Communicate the value of fiduciary relationships to the public at large

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