



CENTER FOR BOARD CERTIFIED FIDUCIARIES™

860-333-3401 • www.c-bcf.com

THE CENTER

The Center for Board Certified Fiduciaries™ (CBCF™) is a Public Benefits Corporation (PBC) founded and funded by fiduciary advocates to engage in the development of fiduciary standards and the delivery of fiduciary training programs. The CBCF™ is affiliating with a leading university to provide a graduate-level certificate in fiduciary leadership, stewardship, and governance, and to develop the curricula for the first Master's and Ph.D. program that includes a concentration in fiduciary responsibility.

CBCF™ MEMBERS

The board-certified members of the CBCF™ are leading professionals who have demonstrated a mastery of (1) the leadership and stewardship behaviors that define a fiduciary's sense of purpose; (2) a prudent process outlined by the Uniform Code of Fiduciary Conduct; and (3) best practices associated with a particular fiduciary specialty (such as Defined Contribution Plans). Board certification is the process by which a professional demonstrates a mastery of basic knowledge and skills through written, practical, or simulator-based testing.

CBCF™ AUDIENCE

The CBCF™ will focus on serving the 8 million lay-fiduciaries (trustees, sponsors, and investment committee members) who manage the assets of pension plans, foundations, endowments, and personal trusts. Most lack the time, inclination, and knowledge to prudently manage their fiduciary roles and responsibilities.

STATUS AS A PUBLIC BENEFITS CORPORATION (PBC):

The specific public benefit purpose of the Center for Board Certified Fiduciaries™ (CBCF™) is to provide fiduciaries with a better understanding of fiduciary standards by:

- defining appropriate standards and best practices
- conducting research on said standards and best practices
- publishing research on fiduciary standards and best practices
- providing education in leadership, stewardship, and governance for fiduciaries
- fostering the best practices related to the appropriate delegation of responsibilities
- providing regulators with expert advice and counsel to raise the quality of fiduciary standards promulgated by regulators and self-regulatory organizations (SROs)
- serving as a translator to make said standards more accessible, understandable and practical for the practicing fiduciary
- serving as a forum for the general public to promote fiduciary standards by enabling consortiums and by hosting educational conferences and events.

Established 2020, Incorporation: Delaware Public Benefit Corporation (PBC)

Chairman: Donald K. Jones, AIFA

CEO: Don Trone, L5, don.trone@c-bcf.com