

NEWS RELEASE

INVESTMENT ADVISOR IS CERTIFIED FOR FIDUCIARY EXCELLENCE

PITTSBURGH, MARCH 20, 2017 – CEFEX, the Centre for Fiduciary Excellence, LLC, an fi360 company, has certified Bosch Financial and IFP Plan Management of Florence, KY to the standard described in the handbook “Prudent Practices[®] for Investment Advisors.” Bosch Financial and IFP Plan Management are affiliated with Independent Financial Partners, a Registered Investment Advisor and the firms join the select group of Investment Advisors to successfully complete the independent certification process.

The standard describes how an Investment Advisor assumes the responsibility for managing a client’s overall investment management process, which includes the selection, monitoring and de-selection of investment managers, as well as developing processes to implement investment strategies and fiduciary practices on an ongoing basis. According to the General Manager of the Centre for Fiduciary Excellence, Carlos Panksep, “Through CEFEX’s independent assessment, the certification provides assurance to investors, both institutional and individual, that Bosch-IFP Plan Management has demonstrated adherence to fiduciary best practices. This indicates the firms’ interests are aligned with those of investors.”

Bosch Financial and IFP Plan Management have been certified for individual, non-profit, trust wealth-management services including management of participant accounts in company ERISA DC plans and Non-ERISA governmental 403(b) and 457 plans. Bosch Financial and IFP Plan Management are registered at www.cefex.org, where the certificate can also be viewed.

The standard is substantiated by legislation, case law and regulatory opinion letters from the Employee Retirement Income Security Act (ERISA), the Investment Advisers Act of 1940, the Uniform Prudent Investor Act (UPIA), the Uniform Prudent Management of Institutional Funds Act (UPMIFA) and the Uniform Management of Public Employee Retirement Systems Act (UMPERSA) in the US.

A full copy of the standard can be downloaded from CEFEX at www.cefex.org and a summary can be viewed by clicking on Bosch-IFP’s on-line CEFEX certificate. More information about Bosch Financial and IFP Plan Management is available at www.boschfinancial.com and www.ifplanmanagement.com.

About CEFEX[®]:

CEFEX[®], Centre for Fiduciary Excellence, LLC, an fi360 company, is an independent certification organization. CEFEX works closely with industry experts to provide comprehensive assessment programs to improve the fiduciary practices of investment stewards, advisors, recordkeepers, administrators and managers. CEFEX has offices in Pittsburgh, PA and Toronto, Canada.

About fi360[®]:

fi360’s mission is to help institutions and advisors gather, grow, and protect assets through better investment and business decision-making. fi360’s capabilities include professional development, software applications, and research and practice management. fi360 is the home of the AIF[®] designation and the fi360 Toolkit[®], and is the parent company of Ann Schleck & Co. and CEFEX. For more information about fi360, please visit www.fi360.com.