

Allodium Investment Consultants
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NEWS RELEASE

ALLODIUM INVESTMENT CONSULTANTS RENEWS CERTIFICATION FOR FIDUCIARY EXCELLENCE

PITTSBURGH, September 6, 2023 – Allodium Investment Consultants in Minneapolis, Minnesota is honored to announce our recertification from the Centre for Fiduciary Excellence (CEFEX), a division of Broadridge Fi360 Solutions (Broadridge). This certification is only granted by Broadridge to firms that demonstrate adherence to fiduciary best practices. It is a hallmark accomplishment for Allodium as it signifies conformity to a recognized global standard of fiduciary excellence.

Allodium was subject to a rigorous, multi-month audit and certification process guided by the *Prudent Practices[®] for Investment Advisors*, an industry-recognized handbook that is grounded in law, regulation and professional best practices.

David Bromelkamp, CEO of Allodium, said “CEFEX certification is like the Good Housekeeping Seal of Approval for advisory firms and nonprofits.”

Allodium Investment Consultants has earned the Investment Advisor Certification for investment management services for individuals, families and organizations. Allodium’s certification is registered and can be viewed [here](#).

CEFEX certification standards are 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 U.S. A full copy of the standard can be downloaded from Broadridge at www.fi360.com/cefex and a summary can be viewed by clicking on Allodium’s online [CEFEX certificate](#).

For more information about Allodium, please visit us at www.allodium.com.

About Allodium:

Allodium Investment Consultants is a fee-only investment management consulting firm that provides investment management services to both individual and institutional investors. Advisory services include Wealth Management, Fiduciary Management, Investment Management Consulting, Financial Planning and Fiduciary Consulting. The firm is a member of the National Association of Personal Financial Advisors (NAPFA) and provides fee-only financial advice that supports the fiduciary standard of care. Learn more at www.allodium.com.

About Broadridge Fi360 Solutions:

Broadridge Fi360 Solutions is a fiduciary education, training, and technology organization within Broadridge, that helps financial intermediaries use prudent fiduciary practices to profitably gather, grow and protect investors’ assets. Since 1999, the organization has provided financial professionals with the tools necessary to act as a fiduciary in their work with investors. Broadridge Fi360 Solutions is the home of the Accredited Investment Fiduciary[®] (AIF[®]) designation, the Fiduciary Focus Toolkit[™], the Fi360 Fiduciary Score[®] and CEFEX, Centre for Fiduciary Excellence[®]. Learn more at www.fi360.com via [Twitter](#) or on [LinkedIn](#).