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NEWS RELEASE

INVESTMENT ADVISOR IS CERTIFIED FOR FIDUCIARY EXCELLENCE

PITTSBURGH, OCTOBER 18, 2018 – CEFEX, the Centre for Fiduciary Excellence, LLC, an Fi360[®], Inc. company, has certified Insight Financial Partners, LLC (Insight) in Lakewood, IL to the standard described in the handbook “Prudent Practices[®] for Investment Advisors”. Insight joins the elite 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 Managing Director of the Centre for Fiduciary Excellence, Carlos Panksep, “Through CEFEX’s independent assessment, the certification provides assurance to plan sponsors, that Insight has demonstrated adherence to the industry’s best fiduciary practices. This indicates the firm’s interests are aligned with those of its clients.”

Insight is certified as an investment advisor representative to employer sponsored qualified retirement plans and is registered at www.cefex.org, where its certificate can also be viewed.

“The CEFEX certification substantiates our independent and objective commitment to our clients that we conform to the fiduciary standards of excellence,” said Michael Smith, Founder and Managing Partner, Insight Financial Partners, LLC. “Their annual assessment of our firm and service model ensures our passionate pursuit of continuous improvement, as well as our on-going commitment to prudent fiduciary best practices.”

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 U.S.

A full copy of the standard can be downloaded from CEFEX at www.cefex.org and a summary can be viewed by clicking on Insight’s on-line CEFEX certificate. More information about Insight Financial Partners, LLC is available at www.insightfpllc.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 is based in Pittsburgh, PA. Connect to CEFEX at www.CEFEX.org, via [Twitter](#) @CEFEX1 and on [LinkedIn](#) @CEFEX.

About Fi360[®]:

Fi360, a fiduciary education, training and technology company, helps financial intermediaries use prudent fiduciary practices to profitably gather, grow and protect investors’ assets. Since 1999, the firm has provided financial professionals with the tools

necessary to act as a fiduciary in their work with investors. Headquartered in Pittsburgh, PA, Fi360 is the home of the Accredited Investment Fiduciary® (AIF®) designation, the Fiduciary Focus Toolkit™ and the Fi360 Fiduciary Score®. Fi360 is also the parent company of CEFEX. Learn more at www.fi360.com via [Twitter](#) or on [LinkedIn](#)