

The Mark

Board Certified Fiduciary™ (BCF™) is a professional mark awarded by the Center for Board Certified Fiduciaries™ (CBCF™). This credential represents peer acknowledgment of the professional knowledge, skills, work experience and expertise that defines an exceptional fiduciary leader.

The Center for Board Certified Fiduciaries™ (CBCF™) is a public benefit corporation (PBC) founded in 2020 and funded by leading fiduciary advocates to provide the critical infrastructure to develop fiduciaries and to board certify fiduciary professionals in one of ten areas of specialization. The process to board certify trained fiduciaries is similar to a Ph.D. defense—an oral examination administered by three specialty leaders.



In the process of CBCF™ board certification, a professional demonstrates proficiency in the essential knowledge and skills through written, practical, or simulator-based testing. In addition, the members of the CBCF™ also complete *Neuro-Fiduciary* training and must demonstrate an understanding of how specific leadership and stewardship behaviors impact the quality of a fiduciary's decision-making process.

Completion Criteria

BCF™ certification candidates have to meet the Center's predetermined professional standards and demonstrate a strong understanding of the following:

- (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.

To become a Board Certified Fiduciary™ (BCF™), a certification candidate must undergo the following process:

Step 1: The candidate will review the training curriculum.

Step 2: The candidate will complete the FiduciaryMetrics® self-assessment.

Step 3: A Mentor—one of the specialty leaders—will be assigned to the candidate.

Step 4: The candidate will complete their developmental plan.

Step 5: The candidate will schedule their peer review for board certification.

Individuals who complete the Board Certified Fiduciary™ (BCF™) program are admitted as a member of the Center for Board Certified Fiduciaries™ (CBCF™) and are entitled to use the professional mark of Board Certified Fiduciary™ (BCF™). For additional information about this credential or to find a Board Certified Fiduciary™ (BCF™) in your area, please refer directly to the Center's website at www.c-bcf.com. To start the process to obtain the Board Certified Fiduciary™ (BCF™) professional mark, contact the Center directly at info@c-bcf.com.

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