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**RELEASE:** Immediate

## **JEFFREY OWENS AND JONATHAN OWENS EARNED ACCREDITED INVESTMENT FIDUCIARY DESIGNATION FROM THE CENTER FOR FIDUCIARY STUDIES**

**CLACKAMAS, OR - July 8, 2013** – Jeffrey Owens and Jonathan Owens of **The Business Planning Group** have been awarded the Accredited Investment Fiduciary® (AIF®) Designation from the Center for Fiduciary Studies™ (the Center), the standards-setting body for fi360. The AIF Designation signifies specialized knowledge of fiduciary responsibility and the ability to implement policies and procedures that meet a defined standard of care. The Designation is the culmination of a rigorous training program, which includes a comprehensive, closed-book final examination under the supervision of a proctor, and agreement to abide by the Code of Ethics. On an ongoing basis, Designees are required to complete continuing education to maintain the AIF Designation.

The Business Planning Group focuses on designing and funding succession plans and exit strategies to help business owners become financially independent from their company. Their other services include comprehensive wealth management, retirement planning, estate planning, executive benefits and employee benefits planning. BPG is a financial planning firm associated with Boston Partners Financial Group, LLC in Andover, MA; an independent firm affiliated with John Hancock Financial Network. For more information on Jeff, Jon or The Business Planning Group visit the website at [www.bpgnetwork.com](http://www.bpgnetwork.com).

Fi360, based near Pittsburgh, Pa., is the first full-time training and research facility for fiduciaries, and conducts training programs at universities throughout the United States and abroad. The Center for Fiduciary Studies confers the AIF Designation as well as the Accredited Investment Fiduciary Analyst™ (AIFA®) Designation. AIFA Designees are the only recognized professionals trained to perform fiduciary assessments, which measure how well investment professionals are fulfilling the fiduciary duties required of them by the applicable investment legislation, case law, and regulatory opinion letters.

### **About fi360**

<sup>1</sup>Fi360 offers training, tools and resources to promote a culture of fiduciary responsibility and improve the decision making processes of investment fiduciaries – individuals who manage money for others. Fi360 provides investment education and training programs, and develops sophisticated Web-based tools and reporting include the innovative fi360 Fiduciary Score® and the Family Fund Fiduciary Rankings™ for trustees and investment professionals. The Center for Fiduciary Studies confers the Accredited Investment Fiduciary® (AIF®) and Accredited Investment Fiduciary Analyst™ (AIFA®) [professional Designations](#). For more information on future fi360 events, training programs and fiduciary products, visit [www.fi360.com](http://www.fi360.com).