

How advisors can position the AIF to differentiate themselves

Domenick D'Andrea AIF®, CRC®, CPFATM notably differentiates his advisory services with AIF® designation.

The challenge: set your practice apart

After decades in the industry, Domenick D'Andrea, financial advisor at DanDarah Wealth Management, wanted to communicate his fiduciary experience to clients and prospects. He thought a professional credential would signify his commitment to a prudent investment process. But his busy schedule meant he needed a solution with a flexible path towards attainment.

The solution: signify fiduciary excellence

D'Andrea researched the top credentials in the industry, quickly deciding to pursue the Accredited Investment Fiduciary® (AIF®) designation. It was clear that the mark holds high fiduciary significance and would demonstrate that he operates under best interest standards — always putting client interests ahead of his own.

To be recognized as an AIF designee, D'Andrea needed to enroll in AIF designation training and pass the exam. He was pleased to find that the curriculum is rooted in the Prudent Practices® for Investment Advisors handbook. This step-by-step guide helps advisors ensure a fiduciary investment strategy is properly developed, implemented and monitored according to legal and ethical obligations.

Plus, a self-paced online training option offered the ideal flexibility and convenience he needed to complete all requirements on his own timeline. Enrollment, testing, credentialing, continuing education, along with ongoing reviews and renewals, could also be conveniently managed within one intuitive online dashboard.



Reasons to become an AIF designee

Increase client base

Boost business opportunities by and gain more interest from high-net-worth clients.

Open conversations

Holds a higher standard and adds an immediate layer of credibility for clients and prospects who routinely ask, “Are you a fiduciary?”

Demonstrate commitment

Validate commitment to ongoing education and provide an attestation that services are conducted in an ethical, client-centric manner.

- May lend instant credibility and distinction with new prospects
- Boosts business efficiency, effectiveness and earning potential
- Makes introductory conversations easier and differentiating
- Shrinks business risks by documenting fiduciary best practices

Contact us

1 866-390-5080
FI360sales@Broadridge.com

Why investment advisors like Domenick D’Andrea recommend the AIF® designation

The AIF designation opens conversations and helps close deals for financial advisors, consultants and professionals. It can appeal to those at every age and stage of the investment process and provides financial planners with an important competitive advantage. Plus, training for the AIF designation completed at your own schedule through a self-paced online option, virtually with a live instructor, or in-person during select events.

Lean into best practices

The AIF designation training program helps ensure advisors have the tools to properly develop, implement and adhere to legal and ethical standards. Credentialing and ongoing monitoring reinforce industry best practices and compliance. By earning the designation, advisors demonstrate they have their clients’ best interests at heart.

Optimize value for your dollar

Broad, reputable appeal makes the AIF designation an exceptional value for your investment. Its credibility is amongst the top in financial services as evidenced by Fi360 being accredited by the ANSI National Accreditation Board (ANAB) under international standard 17024 for the AIF designation.

The AIF Designation is not a guarantee of future investment success. Cetera Investors is a marketing name of Cetera Investment Services. Securities and Insurance Products are offered through Cetera Investment Services LLC, member FINRA/SIPC. Advisory services are offered through Cetera Investment Advisers LLC.

Registered Branch:

1400 Old Country Road, Suite 408, Westbury, NY 11590.
516-338-4888 x107

Broadridge Financial Solutions (NYSE: BR) is a global technology leader with the trusted expertise and transformative technology to help clients and the financial services industry operate, innovate, and grow. We power investing, governance, and communications for our clients – driving operational resiliency, elevating business performance, and transforming investor experiences.

Our technology and operations platforms process and generate over 7 billion communications per year and underpin the daily trading of more than \$10 trillion of securities globally. A certified Great Place to Work®, Broadridge is part of the S&P 500® Index, employing over 14,000 associates in 21 countries.

[Broadridge.com](https://broadridge.com)



Partner with a leader

More than two decades of industry experience as an advocate, leader and service provider in the fiduciary space are embodied in Broadridge Fi360 Solutions. The comprehensive set of software, data and education solutions simplifies the implementation of a prudent, repeatable process at both the institutional and advisor levels.

“By earning the AIF designation, I’ve opened the door to more higher net worth investors and valuable word-of-mouth referrals.”

— **Domenick D’Andrea, Financial Advisor at DanDarah Wealth Management**

