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ALLODIUM INVESTMENT CONSULTANTS RENEWS CERTIFICATION FOR FIDUCIARY EXCELLENCE

MINNEAPOLIS, MN, August 29, 2024 – Allodium Investment Consultants in Minneapolis, Minnesota, is honored to announce the formal achievement of the Centre for Fiduciary Excellence (CEFEX®) recertification from Broadridge. The recertification included an independent assessment of management processes, investment strategy implementation, and other fiduciary practices.

Part of the evidence-based assessment included successfully demonstrating adherence to documented and legally substantiated best practice fiduciary standards. The annually renewed certification signifies an ongoing commitment to providing consistent objective advice that's in a client's best interest — both at the institutional and individual levels.

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

The CEFEX certification program is based on the International Standards Organization (ISO) 19011: Guidelines for auditing management systems. The standard, "Prudent Practices for Investment Advisors" 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 Model Management of Public Employee Retirement Systems Act (MMPERSA) in the U.S.

For more information about the standard, visit Broadridge at www.fi360.com/cefex. To view Allodium's certificate online, visit [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](#).