

May 22, 2007

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Fiduciary Training & Tools for Retirement Advisors Offered Free Sessions

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PITTSBURGH, PA, May 16, 2007 -- Along with ERISA, the Pension Protection Act of 2006 (PPA) propelled fiduciary compliance to the forefront of the retirement industry. Consistent with this theme, Financial Service Standards LLC of Pittsburgh will host three complimentary training sessions on fiduciary compliance as part of the CFDD's 2007 Advisor Conference wraparound fiduciary education program.

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The fiduciary compliance sessions will be held on Sunday, 9/30/2007, the day before the CFDD's October 1-3, 2007 Advisor Conference. Both the conference and the wraparound education program will be held at the Fairmont Scottsdale Princess Resort in Scottsdale, Arizona.

Continuing education credits are available for completion of the training sessions and pre-registration is required at <http://www.401kservicetraining.com/CFDDspecials.htm>

"Managing fiduciary liability and responsibility are topics that advisors are seeking help with right now," explains Sharon Pivirotto, COO of Financial Service Standards LLC, sponsor of the free training. "In fact, plan sponsors may soon require advisors to become 'card-carrying' fiduciaries. We're stepping up to assist advisors with free training and tools as an introduction to our 401k Service Training Program™. The program leads to the Professional Plan Consultant™ (PPC™) designation and centers around a prudent process for managing plans according to standards of fiduciary excellence that strive to exceed the PPA and ERISA guidelines."

Session Times & Dates

Pre-registered attendees will be eligible to attend the following three complimentary training sessions on fiduciary compliance at the Fairmont Scottsdale Princess Resort conference center on Sunday, September 30, 2007:

- "Maintaining A Prudent Process: The Key to Ongoing Fiduciary Compliance & Marketing Leverage" Scheduled from 8:15 - 9:15 am, this session addresses



how a prudent process serves to elevate the standards of service for existing plans and attract new business.

- "Plan Management 101: How Sponsors Need to Document Fiduciary Compliance" Scheduled from 9:30 - 10:30 am, this session addresses the fiduciary responsibilities plan sponsors cannot delegate and introduces the "Fiduciary Briefcase," ten critical documents advisors can use to lead sponsors through fiduciary compliance.
- "Meeting Global Fiduciary Standards of Care: How to Prepare Your Practice for an ERISA Audit" Scheduled from 10:45 - 11:45 am, this session addresses the steps and documentation necessary to prepare for a Global Fiduciary Standards of Care audit leading to CEFEX certification.

All sessions will be taught by Financial Service Standards' leading trainers: Don Settina, CFA®, AIFA®, PPC™ and Sharon Pivrotto, AIF®, PPC™.

Continuing Education Credits Available

The three complimentary training sessions will qualify for up to three hours of continuing education credits (crediting organizations will be listed on CFDD's website).

For Professional Plan Consultants™ (PPC™), the sessions will satisfy all four hours of annual continuing education required to maintain the designation.

For advisors seeking the PPC™ designation, the three combined sessions will satisfy the "classroom training" requirement and the balance of the training can be accessed on-

About the Center for Due Diligence's Advisor Conference

The CFDD's 2007 Advisor Conference, "Transitioning from Salesperson to Businessperson," will be held at the Fairmont Scottsdale Princess Resort from October 1-3, 2007 in Scottsdale, Arizona. The conference features over sixty different sessions, including three keynote sessions, weekend wraparound events, a conference kick-off party and a charity golf event. The conference forecasts the direction of the retirement industry and over 1,000 retirement specialists attend the annual event. For more information visit <http://www.401kduediligence.com/CFDDconference2007.asp>

About Financial Service Standards LLC

Financial Service Standards LLC was founded in 2005 by investment professionals Donald Settina, PPC™ CFP®, AIFA® and Sharon Pivrotto, PPC™ and AIF®. The company is devoted to identifying and raising the service standards of financial professionals. Financial Service Standards LLC sponsors the 401k Service Training Program accredited by Robert Morris University, Pittsburgh. In less than two short years, over 150 retirement professionals utilized the program to assist them in obtaining the Professional Plan Consultant™ (PPC™) designation.

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