

Third party certification

Due diligence you can trust

Precision Fiduciary Partners ("PFP") has been certified as a qualified ERISA 3(38) adviser by DALBAR, Inc., the financial community's leading independent expert for evaluating and rating business practices, customer performance, product quality, and service.

This certification demonstrates a documented vetting process performed by a recognized and independent industry expert. The certification process and disclosures are compliant with regulations and guidelines from the Securities and Exchange Commission ("SEC") and Department of Labor ("DoL").



DALBAR DUE DILIGENCE CONSISTS OF:

- Verification of qualifications and relevant disclosures
- Extensive background checks
- Confirmation of adequate insurance protection
- Assessing alignment of contract terms with services offered
- Review of investment methodology and practice
- Compliance with applicable state/federal securities law

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