

## fi360 and MacroRisk Analytics Announce New Strategic Relationship

MacroRisk Analytics ([www.MacroRisk.com](http://www.MacroRisk.com)), the leading provider of “Investment Tools for a Changing Economy®”, and fi360 ([www.fi360.com](http://www.fi360.com)), the organization behind the prestigious Accredited Investment Fiduciary® (AIF®) and Accredited Investment Fiduciary Analyst® (AIFA®) designations, are joining forces to make their respective tools and resources more widely available to fiduciaries and wealth managers.

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The economy is a critical factor in the long run risk and performance of portfolios and endowments. Fiduciaries are required to document economic impacts under the Uniform Prudent Investment Act (UPIA) and numerous other laws, regulations, and standards. “We’ve been developing tools with UPIA and similar rules in mind since 1999,” says G. Michael Phillips, Chief Scientist and CEO of MacroRisk Analytics. “We provide a patented and easy to implement solution for the economic analysis component of UPIA, UPAIA, UPMIFA, UMPERSA and other fiduciary standards. MacroRisk helps fiduciaries and wealth managers evaluate portfolio holdings for risk/return characteristics, the impact of current economic conditions, and the impact of each asset on the rest of the portfolio. The platform can also help identify appropriate changes to the portfolio if fiduciaries discover unacceptable economic exposure.”

According to Steve Case, AIF: “In March of 2009 after the markets had dropped 37% the previous year and 25% year to date, I wished I had a tool that would help me reduce my clients’ exposure to the economy. I started a quest that led me to MacroRisk Analytics. My experience with Macrorisk has been spectacular. It helps show how a portfolio or asset is aligned to the economy, and in investing the economy does matter.”

“But, economic analysis is only one component in the analysis and management of portfolios by fiduciaries,” explains Phillips who is also a finance professor and author. “I’ve been using fi360

materials in my classes and research for years and wanted to give the MacroRisk Analytics community better access to their training and resources. This agreement is a great first step.”

"We are excited about expanding our relationship with MacroRisk," said fi360 CEO Blaine Aikin. "Our designees and subscribers will find their risk evaluation tools to be a valuable complement to our fiduciary products and services."

#### About fi360

Fi360 offers a comprehensive approach to investment fiduciary education, practice management and support that has established them as the go-to source for investment fiduciary insights. With substantiated Practices as the foundation, fi360 offers world-class fiduciary Training/Education, Tools and Resources that are essential for fiduciaries and those who provide services to fiduciaries to effectively and successfully manage their roles and responsibilities. Fi360 assists those who rely on their fiduciary education programs, professional AIF® and AIFA® designations, web-based analytical and reporting software and resources to achieve success. For more information about fi360, please visit [www.fi360.com](http://www.fi360.com) or Twitter: @fiduciary360.

#### About MacroRisk Analytics

With over a dozen patents, MacroRisk Analytics provides “Investment Tools for a Changing Economy®” to fiduciaries, wealth managers, and institutional investors including powerful risk analysis, asset screening, portfolio construction, and reporting and documentation tools. The MacroRisk online platform provides timely statistics for domestic mutual funds, major stocks, ETFs, ADRs, and indexes and allows users to use over 100,000 economic variables for selecting assets, modeling responses, testing scenarios, and assessing the impact of the economy on assets and portfolios. MacroRisk.com is a part of the Center for Computationally Advanced Statistical Techniques (c4cast.com, Inc.) in Pasadena, California.

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Contact: Philip J. Hahn, Director of Marketing and Sales, MacroRisk Analytics ([www.MacroRisk.com](http://www.MacroRisk.com))  
888.502.3605