

Center for Fiduciary Management Releases Stable Value Investment Monitoring Services

The Center for Fiduciary Management (CFFM), makers of the FiRM and RFP Director retirement advisor toolsets, announces the availability of the first of several Stable Value monitoring and analysis tools for ERISA-focused retirement plan advisors.

The first release is comprised of performance data and profiles for over 35 Stable Value Products covering all three types of Stable Value Funds: General Account, Separate Account, and Synthetic. It also includes advisor and plan sponsor educational material. This release can be integrated with the FiRM Investment Due Diligence / Monitoring System, or utilized as a standalone set of data and profiles for people who don't use FiRM.

"This service will address two key needs for advisors," said Scott Revare, CEO of CFFM.

"The first need is data availability. Traditional industry data providers offer a limited selection of stable value data. Advisors are left with doing their own data collection or more often than not, just not evaluating the plan's Stable Value options."

Revare continued: "The second need for advisors is educational material for them and their clients. Many advisors are unfamiliar with stable value funds. These investments are unique to the retirement industry, and the key factors to monitor them aren't the same as other investment options. This service includes educational materials to get advisors up to speed on what they need to know, and presentation material for them to discuss what their Plan Sponsors should know."

To source the stable value data and education materials, CFFM has partnered with Blue Prairie Group (www.blueprairiegroup.com), a Registered Investment Advisor known for its in-depth Stable Value Research for their clients.

"With the amount of Participant assets invested in Stable Value funds, the fact that these investments are often not evaluated is a potential issue for both advisors and Plan Sponsors," said Connie Mulligan, Director of Investment Research at Blue Prairie Group. "And with Money Market reform hitting later this year, more advisors and plan sponsors are likely to move over to the Stable Value camp very soon. After Target Date Funds, Stable Value Funds are often the second largest asset class in a typical 401(k) plan which means advisors and sponsors need a comprehensive suite of tools to evaluate them on a regular basis. "

Future releases of CFFM's Stable Value focused tools and services will include customizable evaluation criteria and a Stable Value Fund comparison application, which will be standalone, or integrated with CFFM's FiRM or RFP Director Provider Search Tools.

The Stable Value Monitoring Toolkit includes:

Performance data and fund profiles for 35 stable value fund products

An educational primer on stable value funds.

Stable Value Plan Sponsor educational material

Quarterly update commentary on the Stable Value market.

For additional information on CFFMs Stable Value Investment Services, contact:

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About Center for Fiduciary Management (CFFM).

CFFM is a leading software and services provider to retirement advisors and those companies that serve them. CFFM supports over 2,000 retirement advisors who manage or market to over 59,000 retirement plans.

CFFM specializes in providing the retirement plan industry with investment monitoring services through its toolset FiRM, and providing online Retirement Service Provider Search and RFP services through its toolset RFP Director.

CFFM's toolset flexibility has resulted in a diverse customer base: Broker Dealers, Independent Registered Investment Advisory Firms, Fund Companies, Recordkeepers, TPAs, Banks and Insurance Companies.

About Blue Prairie Group

Blue Prairie Group is an independently owned, fee-based investment consulting firm providing unbiased and objective financial consulting through three main practice areas: ERISA Retirement, Foundations & Endowments and Wealth Management. It acts as fiduciaries to all of its clients' portfolios and is remunerated solely by our clients. Headquartered in Chicago, IL, BPG has offices in Atlanta, Chicago, Philadelphia, Pittsburgh, Salem and Tampa. For more information, please contact Ty Parrish at 312-376-8440 or go to www.blueprairiegroup.com.