



CENTRE FOR FIDUCIARY EXCELLENCE

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NEWS RELEASE

CAPITAL ADVISORS FAMILY OFFICE S.A. IS THE FIRST LATIN AMERICAN INVESTMENT ADVISOR CERTIFIED FOR INVESTMENT ADVISOR FIDUCIARY EXCELLENCE

PITTSBURGH, July 16, 2018 – CEFEX, the Centre for Fiduciary Excellence, LLC, an Fi360® company, has certified Capital Advisors Family Office SA (Capital Advisors) of Santiago, Chile to the standard described in the handbook “Prudent Practices for Investment Advisors”. Capital Advisors joins the elite group of global investment advisers to successfully complete the independent certification process.

The standard describes how an investment advisory firm assumes the responsibility for managing a client’s overall investment management process, which includes the selection, monitoring and de-selection of investment managers, as well as developing processes to implement investment strategies and fiduciary practices on an ongoing basis. According to the General Manager, Carlos Panksep, “Through CEFEX’s independent assessment, the certification provides assurance to investors that Capital Advisors has demonstrated adherence to the industry’s best fiduciary practices. This indicates the firm’s interests are aligned with those of investors.”

Capital Advisors has been certified for investment advisory services for wealth management clients engaged in systematic investment strategies. The firm is registered at www.cefex.org, where its certificate can also be viewed.

A full copy of the certification standard can be downloaded from CEFEX at www.cefex.org and a summary can be viewed by clicking on the on-line CEFEX certificate. More information on the firm is available at www.capitaladvisors.cl.

About CEFEX:

CEFEX, Centre for Fiduciary Excellence, LLC, a Fi360 company, is an independent certification organization. CEFEX works closely with industry experts to provide comprehensive assessment programs to improve the fiduciary practices of investment stewards, advisors, recordkeepers, administrators and managers.

CEFEX conducts assessments according to the principles of the international standard ISO/IEC 17021.

Observance of these principles is intended to ensure that CEFEX operates in a competent, consistent and impartial manner, thereby facilitating the recognition of CEFEX and the acceptance of its certifications on a national and international basis. The ISO 17021 standard serves as a foundation for facilitating the recognition of CEFEX certification in the interests of national and international trade.

Certification provides independent demonstration that the management system of the organization:

- conforms to specified requirements described within a standard,
- is capable of consistently achieving its stated policy and objectives, and
- is effectively implemented.

The assessment thereby provides value to the organization, its customers and interested parties. The overall aim of certification is to give confidence to all parties that a management system fulfills specified requirements. The value of certification is the degree of public confidence and trust that is established through an impartial and competent assessment by a third-party. Parties that have an interest in certification include, but are not limited to:

- Certification bodies,
- The customers of the certified organizations,
- Governmental authorities,
- Self-regulatory organizations, and
- Consumers and other members of the public

About Fi360®:

Fi360, a fiduciary education, training and technology company, helps financial intermediaries use prudent fiduciary practices to profitably gather, grow and protect investors' assets. Since 1999, the firm has provided financial professionals with the tools necessary to act as a fiduciary in their work with investors. Headquartered in Pittsburgh, PA, Fi360 is the home of the Accredited Investment Fiduciary® (AIF®) designation, the Fiduciary Focus Toolkit™ and the Fi360 Fiduciary Score®. Fi360 is also the parent company of CEFEX. Learn more at www.Fi360.com, via [Twitter](#) or on [LinkedIn](#)
