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## **Savant Certified for Fiduciary Excellence for 10 Straight Years**

**ROCKFORD, IL (September 6, 2017)** – [Savant Capital Management](#), one of the nation’s largest independent registered investment advisory firms, announced today that CEFEX, the Centre for Fiduciary Excellence, LLC, has renewed the firm’s certification to the standard described in the handbook “Prudent Practices for Investment Advisors.” This is the tenth year of certification for Savant, and it was among the first Investment Advisors to successfully complete the independent certification process.

The CEFEX standard describes how an Investment Advisor 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.

“Savant has demonstrated its commitment to fiduciary excellence for a decade,” said Carlos Panksep, managing director of the Centre for Fiduciary Excellence. “The firm has voluntarily undertaken third party audits to a rigorous best practice standard.”

Savant is certified for investment advisory services, including the role of 3(38) investment manager and non-discretionary 3(21) investment advisor for Employee Retirement Income Security Act (ERISA) plans, 403(b)/church exempt, personal trusts, and high net worth individuals. Savant is registered at [cefex.org/advisor](http://cefex.org/advisor), where the firm’s certificate can also be viewed.

The standard is substantiated by legislation, case law, and regulatory opinion letters from the ERISA, the Investment Advisor’s Act of 1940, Uniform Prudent Investor Act (UPIA), Uniform Prudent Management of Institutional Funds Act (UPMIFA), and the Uniform Management of Public Employee Retirement Systems Act (MPERS) in the U.S.

A full copy of the standard can be downloaded from [CEFEX](#) and a summary can be viewed by clicking on [Savant’s on-line CEFEX certificate](#).

Savant employs more than 145 team members. Headquartered in Rockford, IL, Savant also has offices in Chicago, Freeport, Geneva, Hoffman Estates, Naperville, Peoria, Sterling, and Wilmette, IL; McLean, VA; and Madison and Park Falls, WI. For more information about Savant, visit [savantcapital.com](http://savantcapital.com).

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**About CEFEX®**

CEFEX®, Centre for Fiduciary Excellence, LLC 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 has offices in Pittsburgh, PA and Toronto, Canada.

**About Savant Capital Management**

Savant Capital Management is a leading independent, nationally-recognized, fee-only firm, serving clients for 30 years with \$5 billion in assets under management. As a trusted advisor, Savant Capital Management offers investment management, financial planning, retirement plan and family office services to financially established individuals and institutions. Savant also offers corporate accounting, tax preparation, payroll and consulting through its affiliate, Savant Tax & Consulting.

Savant is regularly recognized among the top wealth managers in the United States. Savant was the recipient of the 2015 Best-in-Business IMPACT Award™, part of Schwab's IMPACT Awards® program to recognize excellence in the business of independent financial advice. Savant has consistently received other industry recognitions including recently being included on the *Forbes* top 200 financial advisors list, the *Barron's* top 20 independent advisory firms list, being named the #9 rated RIA firm by *Financial Planning* magazine, and included in additional top advisors lists by *Financial Advisor* magazine and *InvestmentNews*.

Savant Capital Management is a Registered Investment Advisor. Savant's marketing material should not be construed by any existing or prospective client as a guarantee that they will experience a certain level of results if they engage Savant's services and may include lists or rankings published by magazines and other sources which are generally based exclusively on information prepared and submitted by the recognized advisor. [Click here](#) for more information about Savant or to view our Important Disclosures.

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