

**For Immediate
Release**

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MERITIS AND FI360 ANNOUNCE STRATEGIC AFFILIATION
***Meritis to offer new services based on fi360's Global Standard of
Fiduciary Excellence***

OAKVILLE, Ontario and Pittsburgh, USA – October 30, 2007 – Meritis Governance Inc. (www.meritis.ca), a professional services firm providing Canadian wealth management firms with a focused suite of governance solutions, and fi360 (www.fi360.com), an organization providing training, tools and resources promoting a culture of fiduciary responsibility and improving decision making processes of investment fiduciaries, today announced a new partnership introducing Fiduciary Excellence Practice Management services to Meritis' offerings. The partnership includes Meritis adaptation of fi360's Accredited Investment Fiduciary (AIF) program to the Canadian marketplace, the first time these services have been specifically tailored to the Canadian audience.

The fiduciary excellence concept developed by fi360 is a comprehensive set of responsibilities investment fiduciaries owe to their clients, applicable in all countries that have fiduciary legislation. The process is defined in the *Prudent Practices for Investment Stewards and Investment Advisors (Canada Edition)* handbook, which includes full substantiation from Canadian legislation, case law and opinion letters. The AIF program gives thorough instruction on understanding and implementing the Prudent Practices, with graduates eligible for the AIF designation, and continuing benefits and support from fi360.

"Partnering with Meritis is an important step in advancing a Global Standard of Fiduciary Excellence in Canada," said fi360 CEO Blaine Aikin. "Having a Canadian firm like Meritis customize fi360's training and materials will enable other Canadian investment professionals to implement fiduciary excellence in a way that is more relevant to them."

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MERITIS AND FI360 ANNOUNCE STRATEGIC AFFILIATION
October 30, 2007/Page Two

Included in Meritis' new practice management services will be audits of adherence to fiduciary practices, AIF classroom training, and consulting services to implement and maintain prudent practices for investment fiduciaries. The combined services give investment fiduciaries a direct source for instruction and tools necessary to build a disciplined approach to investing that manages risk and limits liability. Meritis auditing services are based on assessment procedures developed by fi360 and CEFEX (www.cefex.org). These procedures were developed to be similar to the ISO quality management system, which is a systematic process to evaluate adherence to a set of criteria and ensure continual improvement. The most formal level of assessment is CEFEX Certification, which is completely independent and results in acknowledgment from CEFEX of adherence to the *Prudent Practices*.

"Fiduciary Excellence means going above and beyond your requirements as a wealth management professional," said Meritis President Idon Biron. "It is always putting the needs of the investor above all else. Being pro-active in understanding and implementing these practices puts firms at an advantage in the eyes of the public."

The Canadian version of the AIF program is scheduled for release in early 2008. The update will replace all U.S. legislation and other U.S.-specific references with their Canadian equivalents in both the classroom and Web-based programs. Classroom registration will be available through Meritis and Web-based registration through fi360.

About Meritis Governance Inc.

Meritis Governance Inc. is a professional services firm that provides Canadian wealth management firms with a focused suite of governance solutions including the design & implementation of tailored investment fiduciary based governance structures, ongoing governance support and management services and a specialized set of services related to the Independent Review Committees of Canadian Mutual Fund companies. For more information, visit www.meritis.ca.

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MERITIS AND FI360 ANNOUNCE STRATEGIC AFFILIATION
October 30, 2007/Page Three

HighView Financial Group, the parent company of Meritis, is a professional services firm that provides advisory and outsourced business services to Canadian wealth management firms. Our mission is to facilitate independence in the Canadian Wealth Management industry through the integration of strategy, support and capital for managed asset firms and offerings. For more information about HighView Financial Group, visit www.highviewfin.com.

About fi360

Fi360 promotes a culture of fiduciary responsibility and improves the decision making processes of investment fiduciaries – individuals who manage money for others. It delivers training, tools and resources through the Center for Fiduciary Studies and Fiduciary Analytics, which license the Prudent Practices for Investment Fiduciaries from the Foundation for Fiduciary Studies. Through the Center, fi360 provides investment education and training programs and awards the Accredited Investment Fiduciary® (AIF®) and Accredited Investment Fiduciary Analyst™ (AIFA®) [professional designations](#). Its Fiduciary Analytics division develops sophisticated Web-based tools and reporting, including the innovative Fiduciary Score™ and the Fund Family Fiduciary Rankings™ for trustees and investment professionals. For more information, visit www.fi360.com.

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