

## Oakmont Capital Management, LLC Advisor Designation Definitions

### Chartered Financial Analyst®

The CFA® is a globally-recognized professional designation offered through a program of CFA Institute. Individuals will have completed an average of 1,000+ hours of rigorous study, along with four (4) years of professional experience and successful completion of the CFA Program exam, to earn the distinction of being called a Chartered Financial Analyst®.

Earning the CFA® is a highly selective process which requires candidates to pass three (3) levels of exams covering areas such as accounting, economics, ethics, money management and security analysis. A CFA charter holder must also attest, on an annual basis, that they are following the CFA Institute Code of Ethics and Standards of Professional Conduct.

### Certified Financial Planner®

The CFP® is a professional certification for Financial Advisors who have met the standard of excellence in financial planning set out by the Certified Financial Planner Board of Standards. Individuals will have completed 250 to 1,000 hours of study, three (3) years of professional experience as well as successful completion of a comprehensive exam administered by the CFP Board. A CFP® professional assists individuals with a wide range of financial planning needs to include investment management, retirement planning, insurance, estate and tax planning.

The certification signifies a high level of commitment to competence, ethics and professionalism in the field of financial planning. CFP® professionals must also adhere to a strict code of ethics and standards of conduct set by the CFP Board.

### Chartered Retirement Plans Specialist®

Individuals who hold the CRPS® designation have completed a course of study encompassing design, installation, maintenance and administration of retirement plans. Additionally, individuals must pass an end-of-course examination that tests their ability to synthesize complex concepts and apply theoretical concepts to real-life situations.

### Accredited Investment Fiduciary®

The Accredited Investment Fiduciary (AIF®) is an ethical certification issued by F360 to advisors who have completed the course on ethical behavior and fiduciary services. The designation empowers investment professionals with the fiduciary knowledge and understanding of the principals of fiduciary duty, the standards of conduct for acting as a fiduciary, and a process for carrying out fiduciary responsibility.

### Chartered Alternative Investment Analyst®

The CAIA Charter is a globally-recognized credential for professionals offered by the CAIA Association®. Individuals who have earned the credential have at least one (1) year experience and have completed and passed a two-level curriculum. The CAIA® manages, distributes or alternative investments such as hedge funds, venture capital, private equity and real estate.