PTO Form 1960 (Rev 9/2007)
OMB No. 0651-0050 (Exp. 07/31/2017)

Request for Reconsideration after Final Action

The table below presents the data as entered.

Input Field	Entered
SERIAL NUMBER	85802805
LAW OFFICE ASSIGNED	LAW OFFICE 116
MARK SECTION (no change)	
ARGUMENT(S)	

Fund Family Fiduciary Rankings Is Suggestive, Not Descriptive, of Applicant's Services

The Trademark Examining Attorney has refused registration of Applicant's "Fund Family Fiduciary Rankings" mark on the basis that "Fund Family Fiduciary Rankings" is at least merely descriptive of Applicant's services. Applicant respectfully submits that, for the reasons set forth below, in addition to those previously cited in Applicant's Response to Office Action filed on April 23, 2014, "Fund Family Fiduciary Rankings" is suggestive and not merely descriptive of Applicant's services.

Applicant notes that much of the Trademark Examining Attorney's focus relates to the individual components of the mark, which the Examining Attorney concludes is descriptive when combining the results in relation to the services. Such conclusion is a generality, however, and is not supported when combining the specific terms of the Applicant's mark and analyzing them in relation to the services provided.

When taking the component parts together, "Fund Family Fiduciary Rankings" is not descriptive of Applicant's services. A mark is considered merely descriptive if it immediately conveys knowledge of a quality, feature, function, or characteristic of an applicant's goods or services. TMEP § 1209.01(b). Each of the terms requires further thought or inquiry before a reasonable person could reach a conclusion as to the nature of the end result of the services provided by Applicant. Suggestive marks are those that, when applied to the goods or services at issue, require imagination, thought, or perception to reach a conclusion as to the nature of those goods or services. TMEP § 1209.01(a).

The mere fact that the term "ranking" in the mark suggests "an act or an instance of listing" does not render the term descriptive. The same holds true for the terms "fund," "family" and "fiduciary," in relation to the definitions cited by the Examining Attorney. A term that suggests the desired end result of using goods or services is not descriptive of those goods or services. For example, the mark "RECOVERY" is not descriptive of services related to "group therapy in the form of self-help aftercare to follow psychiatric or other professional counseling and/or treatment." *In re Recovery, Inc.*, 196 U.S.P.Q. 830 (TTAB 1977). In *Recovery*, the TTAB explained that:

> 'RECOVERY', when considered in light of applicant's services appears, at first blush, to possess a descriptive significance. But, to articulate the manner in which the term 'RECOVERY' describes those services, one cannot come up with an immediate response, but rather must engage in a mental process involving imagination, speculation, and possibly stretching the meaning of the word to fit the situation.

Id. Further, "'RECOVERY' does not in any real or specific sense describe the particular services rendered by applicant." *Id.* The mark "RECOVERY," therefore, was suggestive and not descriptive, and the TTAB reversed a refusal of registration. Other marks suggesting a desired end result or intended purpose of goods, without describing the goods themselves, have consistently been found to be suggestive and not descriptive. *See, e.g., In re Nalco Chem. Co.*, 228 U.S.P.Q. 972 (TTAB 1986) ("[T]he term 'VERI-CLEAN', as applied to applicant's chemical anti-fouling additives for use in refineries, is suggestive of the desired end result of the use of applicant's additives, but does not serve to describe the goods themselves."); *In re The Noble Co.*, 225 U.S.P.Q. 749 (TTAB 1985) (finding "NOBURST" for liquid antifreeze and rust inhibitor "suggests a desired result of using the product rather than immediately informing the purchasing public of a characteristic, feature, function or attribute thereof"); *In re Frank J. Curran Co.*, 189 U.S.P.Q. 560 (TTAB 1975) ("[T]he words 'CLOTHES FRESH' as used in connection with a clothes and shoe spray deodorant are merely suggestive of a possible desirable end result but do not, in any accepted meaning of the concept of descriptiveness, serve to describe applicant's goods."); *In re C.J. Webb, Inc.*, 182 U.S.P.Q. 63 (TTAB 1974) ("'[B]rake clean' is suggestive of a desired result of a brake cleaner and therefore the asserted phonetic equivalent 'BrÄ•kleen' must be considered to be suggestive rather than merely descriptive when applied to applicant's goods."); *In re Pennwalt Corp.*, 173 U.S.P.Q. 317 (TTAB 1972) (finding "DRI-FOOT" suggestive and not merely descriptive of anti-perspirant deodorant for feet).

The Examining Attorney further reason for denial is that "other companies offer the same type of ranking in trade." Notably, the reference made to "fund family fiduciary rankings" by Fiduciary Analytics, Inc., which is, in fact, **Applicant's company and use of the trademark at issue,** thereby seemingly proveing Applicant's point. Further, the other companies referenced by the Examining Attorney do NOT include the term "fiduciary," which substantially changes the trademark and, instead, demonstrates "Fund Family Fiduciary Rankings" as a source identifier of Applicant's services and proves the mark does not consist of a combination of merely descriptive terms.

Like the mark "RECOVERY" for services related to aftercare to follow psychiatric or other professional counseling and/or treatment, "Fund Family Fiduciary Rankings" "at first blush" may appear "to possess a descriptive significance." *In re Recovery*, 196 U.S.P.Q. 830. But to articulate the manner in which the term "Fund Family Fiduciary Rankings" describes Applicant's services, "one cannot come up with an immediate response, but rather must engage in a mental process involving imagination, speculation, and possibly stretching the meaning of the word to fit the situation." *Id.* Any doubts with respect to whether a mark is descriptive or suggestive should be resolved in favor of suggestiveness, and the mark should be published for opposition. *In re The Noble Co.*, 225 U.S.P.Q. 749.

Further, Applicant would like to call attention to the fact that the mark has been used for more than **ten (10) years**, as opposed to the five (5) year time frame referenced by the Examining Attorney. Such long and extensive use exceeds the requirements for distinctiveness under Trademark Act Section 2(f), and the Affidavit filed with the Application substantiates Applicant's contentions. This is particular true when as shown above that the mark is not highly descriptive. Applicant's respectfully request that the 2(f) be accepted.

The Trademark Examining Attorney also stated that Applicant's mark "is so highly descriptive, and/or generic, applicant's claim of acquired distinctiveness is insufficient." For the reasons set forth above, "Fund Family Fiduciary Rankings" is suggestive, not descriptive, of Applicant's services. In particular, "Fund Family Fiduciary Rankings" is not as simple as immediately describing Applicant's services as "fiduciary rankings" as the Examining Attorney Suggests.

For the foregoing reasons, Applicant respectfully requests withdrawal of the refusal to register based on mere descriptiveness.

I. Specimen

Applicant would like to point Examining Attorney to TMEP 1301.04(i) Example 2

Original ***Specimen***
Substitute ***Specimen***
Mark: PARSE
Services: Platform as a service (PAAS) featuring computer software platforms offering server-side functionality to provide backend services, namely, data storage, push notifications and user management, all for mobile applications, in Class 42.
Analysis:

· Original **specimen** is described as "website offering purchase and download of Parse software"; the substitute **specimen** is described as "website advertising."

· On the substitute **specimen**, the mark is presented in large font on the top of the webpage and on the screen of an electronic device.

· Original **specimen** was refused because the **specimen** and its description indicated the mark is used in association with software goods rather than PAAS services.

· Substitute **specimen** is acceptable due to the following statements referencing the services and the following indicia of the context in which the services are rendered:

o The wording "The mobile app platform for developers" and "Add a powerful and scalable backend in minutes for your Marketing App" describes the nature of the services.

o The "Manage your apps" button indicating that the services are accessed by clicking on the button.

· Mark-services association is present because it is customary to display service marks near the top of the webpages on which the services are advertised or through which they are accessed, rendered, and experienced. Here, the mark is in close proximity to explicit textual references to the services and the "Manage your apps" button, thus creating the mark-services connection.

The above example is very similar to the case at hand. The Examining Attorney refused registration on the basis that the specimen does not show the applied-for mark in use in commerce in connection with services. Applicant submitted a substitute specimen previously.

The substitute specimen is the link that was identified in the original specimen, and it demonstrates the mark used in connection with the services as of June 30, 2012. The services, as described in the Amended Application that has been accepted by the Examining Attorney, read as follows:
Financial information; financial analysis and research services in the nature of providing financial indices based on selected groups of mutual funds to determine said funds' fiduciary ranking" in International Class 36.
As an initial matter is should be noted that the report is the vehicle to deliver the services.
As one can see from the substitute specimen, the financial information, analysis and research services are provided "by identify[ing] and rank[ing] fund families based on the percentage of their individual funds which receive a top quartile fi360 Fiduciary Score® (Quarter). Since 2003, fi360 has produced this report to present the fi360 Fund Family Fiduciary Rankings. This report also presents the change (improvement or decline) in ranking from the prior quarter." See Substitute Specimen at p. 2, ¶ 1. This ranking system is the service that is provided and can only be accomplished by the financial analysis derived from considering financial information and research related to a selected group of mutual funds,

in accordance with the description of services submitted in the Amended Application.

The substitute specimen clearly demonstrates all of the criteria necessary to establish the service in this case. The culmination of financial information, research, analysis and ultimately producing the ranking report is the "service" performed for the benefit of investment advisors, who then use the research reports to advise their clients. This effort in analyzing financial information and generating a report is a real activity and not a computer program or software tool for generating reports or an internal document, as perhaps the original specimen did not make clear to the Examining Attorney. The report is the tangible result of the service provided.

The substitute specimen demonstrates the service being offered and advertised, and the Amended Application should be allowed for registration.

Additionally, a second substitute specimen is being filed with this request for reconsideration.

As can be seen this the FUND FAMILY FIDUCIARY RANKING is part of the subscription service provided via the web to users. The above second specimen clearly shows that fi360 is offering financial analysis and research services in the nature of providing financial indices.

EVIDENCE SECTION	
EVIDENCE FILE NAME(S)	
ORIGINAL PDF FILE	evi_1-7090249209-20141113150924936882_._00018452.PDF
CONVERTED PDF FILE(S) (2 pages)	\\TICRS\EXPORT16\IMAGEOUT16\858\028\85802805\xml10\RFR0002.JPG
	\\TICRS\EXPORT16\IMAGEOUT16\858\028\85802805\xml10\RFR0003.JPG
DESCRIPTION OF EVIDENCE FILE	TMEP 1301.04(i) Example 2
GOODS AND/OR SERVICES SECTION (current)	
INTERNATIONAL CLASS	036
DESCRIPTION	
Financial information; financial analysis and research services in the nature of providing financial indices based on selected groups of mutual funds to determine said funds' fiduciary ranking	
FILING BASIS	Section 1(a)
FIRST USE ANYWHERE DATE	At least as early as 12/31/2003
FIRST USE IN COMMERCE DATE	At least as early as 12/31/2003
GOODS AND/OR SERVICES SECTION (proposed)	
INTERNATIONAL CLASS	036
DESCRIPTION	
Financial information; financial analysis and research services in the nature of providing financial	

indices based on selected groups of mutual funds to determine said funds' fiduciary ranking	
FILING BASIS	Section 1(a)
FIRST USE ANYWHERE DATE	At least as early as 12/31/2003
FIRST USE IN COMMERCE DATE	At least as early as 12/31/2003
STATEMENT TYPE	"**The substitute (or new, if appropriate) specimen(s) was/were in use in commerce at least as early as the filing date of the application**"*[for an application based on Section 1(a), Use in Commerce] OR* "**The substitute (or new, if appropriate) specimen(s) was/were in use in commerce prior either to the filing of the Amendment to Allege Use or expiration of the filing deadline for filing a Statement of Use**" *[for an application based on Section 1(b) Intent-to-Use].*
SPECIMEN FILE NAME(S)	
ORIGINAL PDF FILE	SPU0-7090249209-20141113150924936882_._00018453.PDF
CONVERTED PDF FILE(S) (1 page)	\\TICRS\EXPORT16\IMAGEOUT16\858\028\85802805\xml10\RFR0004.JPG
SPECIMEN DESCRIPTION	Advertising in the form of a web page showing mark and services provided
SIGNATURE SECTION	
DECLARATION SIGNATURE	/John C. Thomas/
SIGNATORY'S NAME	John C. Thomas
SIGNATORY'S POSITION	Attorney of Record, PA Bar Member
DATE SIGNED	11/13/2014
RESPONSE SIGNATURE	/John C. Thomas/
SIGNATORY'S NAME	John C. Thomas
SIGNATORY'S POSITION	Attorney of Record PA bar member
DATE SIGNED	11/13/2014
AUTHORIZED SIGNATORY	YES
CONCURRENT APPEAL NOTICE FILED	NO
FILING INFORMATION SECTION	

SUBMIT DATE	Thu Nov 13 15:33:01 EST 2014
TEAS STAMP	USPTO/RFR-70.90.249.209-2 01411131533014505 34-85802 805-50058d5e97db875e1ae90 1422c3e81d85c7f82d7f596cb 908f128bd96d64a8337-N/A-N /A-20141113150924936882

PTO Form 1960 (Rev 9/2007)
OMB No. 0651-0050 (Exp. 07/31/2017)

Request for Reconsideration after Final Action
To the Commissioner for Trademarks:

Application serial no. **85802805** has been amended as follows:

ARGUMENT(S)
In response to the substantive refusal(s), please note the following:

Fund Family Fiduciary Rankings Is Suggestive, Not Descriptive, of Applicant's Services
The Trademark Examining Attorney has refused registration of Applicant's "Fund Family Fiduciary Rankings" mark on the basis that "Fund Family Fiduciary Rankings" is at least merely descriptive of Applicant's services. Applicant respectfully submits that, for the reasons set forth below, in addition to those previously cited in Applicant's Response to Office Action filed on April 23, 2014, "Fund Family Fiduciary Rankings" is suggestive and not merely descriptive of Applicant's services.
Applicant notes that much of the Trademark Examining Attorney's focus relates to the individual components of the mark, which the Examining Attorney concludes is descriptive when combining the results in relation to the services. Such conclusion is a generality, however, and is not supported when combining the specific terms of the Applicant's mark and analyzing them in relation to the services provided.
When taking the component parts together, "Fund Family Fiduciary Rankings" is not descriptive of Applicant's services. A mark is considered merely descriptive if it immediately conveys knowledge of a quality, feature, function, or characteristic of an applicant's goods or services. TMEP § 1209.01(b). Each of the terms requires further thought or inquiry before a reasonable person could reach a conclusion as to the nature of the end result of the services provided by Applicant. Suggestive marks are those that, when applied to the goods or services at issue, require imagination, thought, or perception to reach a conclusion as to the nature of those goods or services. TMEP § 1209.01(a).
The mere fact that the term "ranking" in the mark suggests "an act or an instance of listing" does not render the term descriptive. The same holds true for the terms "fund," "family" and "fiduciary," in relation to the definitions cited by the Examining Attorney. A term that suggests the desired end result of using goods or services is not descriptive of those goods or services. For example, the mark "RECOVERY" is not descriptive of services related to "group therapy in the form of self-help aftercare to follow psychiatric or other professional counseling and/or treatment." *In re Recovery, Inc.*, 196 U.S.P.Q. 830 (TTAB 1977). In *Recovery*, the TTAB explained that:

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Further, Applicant would like to call attention to the fact that the mark has been used for more than **ten (10) years**, as opposed to the five (5) year time frame referenced by the Examining Attorney. Such long and extensive use exceeds the requirements for distinctiveness under Trademark Act Section 2(f), and the Affidavit filed with the Application substantiates Applicant's contentions. This is particular true when as shown above that the mark is not highly descriptive. Applicant's respectfully request that the 2(f) be accepted.

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· Original **specimen** is described as "website offering purchase and download of Parse software"; the substitute **specimen** is described as "website advertising."

· On the substitute **specimen**, the mark is presented in large font on the top of the webpage and on the screen of an electronic device.

· Original **specimen** was refused because the **specimen** and its description indicated the mark is used in association with software goods rather than PAAS services.

· Substitute **specimen** is acceptable due to the following statements referencing the services and the following indicia of the context in which the services are rendered:

o The wording "The mobile app platform for developers" and "Add a powerful and scalable backend in minutes for your Marketing App" describes the nature of the services.

o The "Manage your apps" button indicating that the services are accessed by clicking on the button.

· Mark-services association is present because it is customary to display service marks near the top of the webpages on which the services are advertised or through which they are accessed, rendered, and experienced. Here, the mark is in close proximity to explicit textual references to the services and the "Manage your apps" button, thus creating the mark-services connection.

The above example is very similar to the case at hand. The Examining Attorney refused registration on the basis that the specimen does not show the applied-for mark in use in commerce in connection with services. Applicant submitted a substitute specimen previously.

The substitute specimen is the link that was identified in the original specimen, and it demonstrates the mark used in connection with the services as of June 30, 2012. The services, as described in the Amended Application that has been accepted by the Examining Attorney, read as follows:
Financial information; financial analysis and research services in the nature of providing financial indices based on selected groups of mutual funds to determine said funds' fiduciary ranking" in International Class 36.
As an initial matter is should be noted that the report is the vehicle to deliver the services.
As one can see from the substitute specimen, the financial information, analysis and research services are provided "by identify[ing] and rank[ing] fund families based on the percentage of their individual funds which receive a top quartile fi360 Fiduciary Score® (Quarter). Since 2003, fi360 has produced this report to present the fi360 Fund Family Fiduciary Rankings. This report also presents the change (improvement

or decline) in ranking from the prior quarter." See Substitute Specimen at p. 2, ¶ 1. This ranking system is the service that is provided and can only be accomplished by the financial analysis derived from considering financial information and research related to a selected group of mutual funds, in accordance with the description of services submitted in the Amended Application.

The substitute specimen clearly demonstrates all of the criteria necessary to establish the service in this case. The culmination of financial information, research, analysis and ultimately producing the ranking report is the "service" performed for the benefit of investment advisors, who then use the research reports to advise their clients. This effort in analyzing financial information and generating a report is a real activity and not a computer program or software tool for generating reports or an internal document, as perhaps the original specimen did not make clear to the Examining Attorney. The report is the tangible result of the service provided.

The substitute specimen demonstrates the service being offered and advertised, and the Amended Application should be allowed for registration.

Additionally, a second substitute specimen is being filed with this request for reconsideration.

As can be seen this the FUND FAMILY FIDUCIARY RANKING is part of the subscription service provided via the web to users. The above second specimen clearly shows that fi360 is offering financial analysis and research services in the nature of providing financial indices.

EVIDENCE

Evidence in the nature of TMEP 1301.04(i) Example 2 has been attached.

Original PDF file:

evi_1-7090249209-20141113150924936882_._00018452.PDF

Converted PDF file(s) (2 pages)

Evidence-1

Evidence-2

CLASSIFICATION AND LISTING OF GOODS/SERVICES

Applicant proposes to amend the following class of goods/services in the application:

Current: Class 036 for Financial information; financial analysis and research services in the nature of providing financial indices based on selected groups of mutual funds to determine said funds' fiduciary ranking

Original Filing Basis:

Filing Basis: Section 1(a), Use in Commerce: The applicant is using the mark in commerce, or the applicant's related company or licensee is using the mark in commerce, on or in connection with the identified goods and/or services. 15 U.S.C. Section 1051(a), as amended. The mark was first used at least as early as 12/31/2003 and first used in commerce at least as early as 12/31/2003 , and is now in use in such commerce.

Proposed: Class 036 for Financial information; financial analysis and research services in the nature of providing financial indices based on selected groups of mutual funds to determine said funds' fiduciary ranking

Filing Basis: Section 1(a), Use in Commerce: The applicant is using the mark in commerce, or the applicant's related company or licensee is using the mark in commerce, on or in connection with the identified goods and/or services. 15 U.S.C. Section 1051(a), as amended. The mark was first used at least as early as 12/31/2003 and first used in commerce at least as early as 12/31/2003 , and is now in use in such commerce.

Applicant hereby submits one(or more) specimen(s) for Class 036 . The specimen(s) submitted consists of Advertising in the form of a web page showing mark and services provided .
" **The substitute (or new, if appropriate) specimen(s) was/were in use in commerce at least as early as the filing date of the application"***[for an application based on Section 1(a), Use in Commerce] OR* " **The substitute (or new, if appropriate) specimen(s) was/were in use in commerce prior either to the filing of the Amendment to Allege Use or expiration of the filing deadline for filing a Statement of Use** " *[for an application based on Section 1(b) Intent-to-Use]* .
Original PDF file:
SPU0-7090249209-20141113150924936882_._00018453.PDF
Converted PDF file(s) (1 page)
Specimen File1

SIGNATURE(S)
Declaration Signature

DECLARATION: The signatory being warned that willful false statements and the like are punishable by fine or imprisonment, or both, under 18 U.S.C. Section 1001, and that such willful false statements and the like may jeopardize the validity of the application or submission or any registration resulting therefrom, declares that, if the applicant submitted the application or amendment to allege use (AAU) unsigned, all statements in the application or AAU and this submission based on the signatory's own knowledge are true, and all statements in the application or AAU and this submission made on information and belief are believed to be true.

STATEMENTS FOR UNSIGNED SECTION 1(a) APPLICATION/AAU: If the applicant filed an unsigned application under 15 U.S.C. Section 1051(a) or AAU under 15 U.S.C. Section 1051(c), the signatory additionally believes that: the applicant is the owner of the trademark/service mark sought to be registered; the applicant or the applicant's related company or licensee is using the mark in commerce and has been using the mark in commerce as of the filing date of the application or AAU on or in connection with the goods/services in the application or AAU, and such use by the applicant's related company or licensee inures to the benefit of the applicant; the original specimen(s), if applicable, shows the mark in use in commerce as of the filing date of the application or AAU on or in connection with the goods/services in the application or AAU; and to the best of the signatory's knowledge and belief, no other person has the right to use the mark in commerce, either in the identical form or in such near resemblance as to be likely, when used on or in connection with the goods/services of such other person, to cause confusion or mistake, or to deceive.

STATEMENTS FOR UNSIGNED SECTION 1(b)/SECTION 44 APPLICATION: If the applicant filed an unsigned application under 15 U.S.C. Section 1051(b), Section 1126(d), and/or Section 1126(e), the signatory additionally believes that: the applicant is entitled to use the mark in commerce; the applicant has a bona fide intention and has had a bona fide intention as of the application filing date to use or use through the applicant's related company or licensee the mark in commerce on or in connection with the goods/services in the application; and to the best of the signatory's knowledge and belief, no other person has the right to use the mark in commerce, either in the identical form or in such near resemblance as to be likely, when used on or in connection with the goods/services of such other person, to cause confusion or mistake, or to deceive.

Signature: /John C. Thomas/ Date: 11/13/2014
Signatory's Name: John C. Thomas
Signatory's Position: Attorney of Record, PA Bar Member

Request for Reconsideration Signature
Signature: /John C. Thomas/ Date: 11/13/2014
Signatory's Name: John C. Thomas
Signatory's Position: Attorney of Record PA bar member

The signatory has confirmed that he/she is an attorney who is a member in good standing of the bar of the highest court of a U.S. state, which includes the District of Columbia, Puerto Rico, and other federal territories and possessions; and he/she is currently the applicant's attorney or an associate thereof; and to the best of his/her knowledge, if prior to his/her appointment another U.S. attorney or a Canadian attorney/agent not currently associated with his/her company/firm previously represented the applicant in this matter: (1) the applicant has filed or is concurrently filing a signed revocation of or substitute power of attorney with the USPTO; (2) the USPTO has granted the request of the prior representative to withdraw; (3) the applicant has filed a power of attorney appointing him/her in this matter; or (4) the applicant's appointed U.S. attorney or Canadian attorney/agent has filed a power of attorney appointing him/her as an associate attorney in this matter.

The applicant is not filing a Notice of Appeal in conjunction with this Request for Reconsideration.

Serial Number: 85802805
Internet Transmission Date: Thu Nov 13 15:33:01 EST 2014
TEAS Stamp: USPTO/RFR-70.90.249.209-20141113153301450534-85802805-50058d5e97db875e1ae901422c3e81d85c7f82d7f596cb908f128bd96d64a8337-N/A-N/A-20141113150924936882

TMEP 1301.04(i) Example 2

Original ***Specimen***

Substitute ***Specimen***

Mark: PARSE

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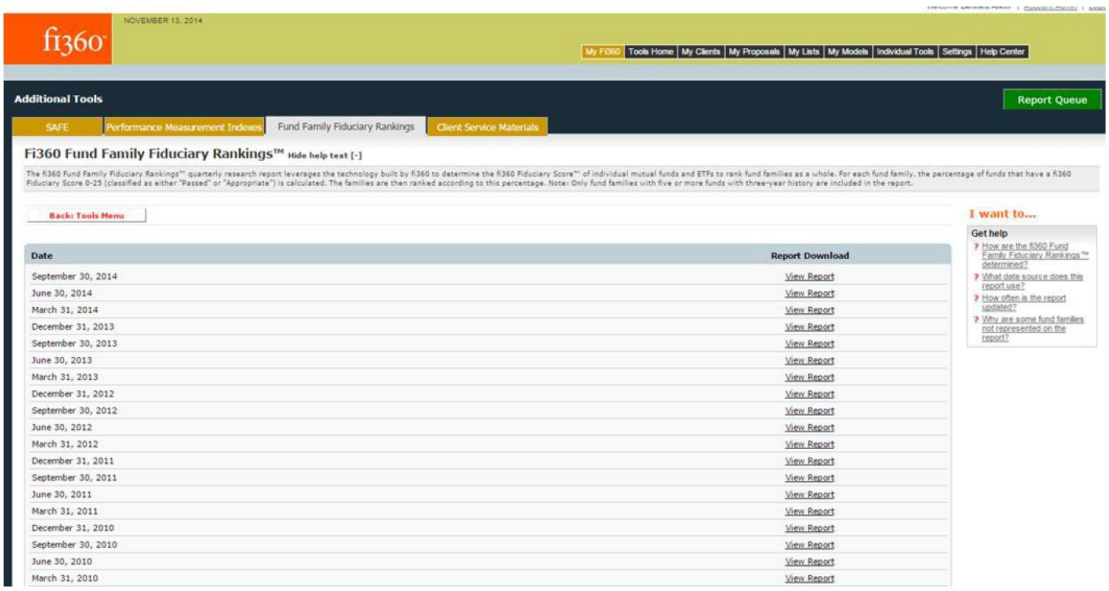
  - The wording “The mobile app platform for developers” and “Add a powerful and scalable backend in minutes for your Marketing App” describes the nature of the services.
  - The “Manage your apps” button indicating that the services are accessed by clicking on the button.
- Mark-services association is present because it is customary to display service marks near the top of the webpages on which the services are advertised or through which they are accessed, rendered, and experienced. Here, the mark is in close proximity to explicit textual references to the services and the “Manage your apps” button, thus creating the mark-services connection.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The fi360 Fund Family Fiduciary Rankings™ quarterly research report leverages the technology built by fi360 to determine the fi360 Fiduciary Score™ of individual mutual funds and ETFs to rank fund families as a whole. For each fund family, the percentage of funds that have a fi360 Fiduciary Score 0-25 (classified as either "Passed" or "Appropriate") is calculated. The families are then ranked according to this percentage. Note: Only fund families with five or more funds with three-year history are included in the report.
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