

FI360

Accredited Investment Fiduciary® Capstone Program Agenda

8:30 – 9:45am	Introduction
9:45 – 10:00am	Investment Manager Practices
<i>10:00 – 10:15pm</i>	<i>Break</i>
10:15 – 11:15am	Stewards and Advisors Step 1: Organize
11:15 – 12:00pm	Stewards and Advisors Step 2: Formalize
<i>12:00 – 1:00pm</i>	<i>Lunch</i>
1:00 – 1:30pm	Step 2: Formalize, continued
1:30 – 2:30pm	Stewards and Advisors Step 3: Implement
<i>2:30 – 2:45pm</i>	<i>Break</i>
2:45 – 3:45pm	Stewards and Advisors Step 4: Monitor
3:45 – 4:00pm	Review and Wrap-Up
4:00 – 5:00pm	AIF Exam