fi360® CONFERENCE 2008 AGENDA

Putting Process into Practice

May 7 – 9, 2008 | The Westin Charlotte | Charlotte, NC

Dynamic speakers, ground-breaking topics, and unique presentation formats will deliver you a fiduciary education you can't find anywhere else!

Conference Highlights:
This year's agenda is brimming with topics and presenters that will inspire new ideas about how to utilize fiduciary tools and expertise in practical ways. You will leave this event armed with relevant and forward thinking education, practice management techniques, and support that can only come from the fi360 Conference.

- 30 unique sessions to choose from in order to customize your fiduciary education experience
- 40 of the industry's most recognized and respected speakers in the fiduciary space
- Unique session formats such as debates, a mock deposition, role-play, and hands-on fi360 Tools seminars
- Continuing education credit
- Networking opportunities
- Special fi360 product & services conference discounts only available to attendees
- Exciting fi360 announcements!

The fi360 Conference is going paper-free!
Prior to the event, all registered attendees will receive a link and instructions to the relevant conference materials. This will include topic descriptions, speaker bios, session presentations, and more. Take an early look at the presentation materials and schedule to map out the conference experience that best meets your needs. Feel free to print the materials you need prior to arriving at the conference or save them to your laptop and follow along during the presentations. All of these materials will be available online before, during, and after the conference so that you can access them as you need them. **You are strongly encouraged to print and/or download the handouts prior to arriving to the conference, as hotel business center printers tend to be slow and expensive.**

Conference Overview:
Wednesday, May 7:
The fi360 staff will be there to greet you during registration which will be open from 12:00 – 4:30pm. We strongly encourage you arrive on Wednesday to collect your materials, prepare for an early conference start, and join us at the Welcome Reception that will take place from 5:00 – 6:30pm for cocktails and light hors d'oeuvres.

Thursday, May 8:
Our continental breakfast and a registration table for late check-ins will open at 7:00am. The conference will begin with a Welcome from the fi360 leadership at 8:00am sharp. You will have the opportunity to attend one keynote session and a choice of SIXTEEN different break-out sessions. The day will end with a networking cocktail reception from 5:00 – 6:30pm which will leave you plenty of time to explore this beautiful city and enjoy a relaxing dinner with friends and colleagues.

Friday, May 9:
Friday's events will be very similar to Thursday. Breakfast will begin at 7:00am and sessions will get underway at 8:00am. There will be two keynote sessions and TWELVE additional break-out sessions to choose from. The Conference will wrap-up by 4:30pm, after the closing remarks that will highlight specials announcements!

Please contact the fi360 team with questions regarding this year's conference via email (conference@fi360.com) or call us at 1.866.390.5080.

WEDNESDAY **MAY 7, 2008**	TIME	EVENT	SPEAKER	LOCATION
	12:00 – 4:30	Registration		Providence Promenade
	5:00 – 6:30	*Welcome Reception*		*Providence Ballroom*

THURSDAY **MAY 8, 2008**	TIME	EVENT	SPEAKER	LOCATION
	7:00 – 7:50	*Continental Breakfast*		*Providence Ballroom*
	8:00 – 8:30	**Welcome**	**fi360 Leadership**	**Grand Ballroom C-D**
	8:30 – 9:30	**Overturning the SEC "Broker Dealer Rule" – What to Expect Going Forward**	**Merril Hirsh Duane Thompson**	**Grand Ballroom C-D**
	9:30 – 9:50	*Networking Break*		*Grand Promenade*
	10:00 – 11:00	Integrating SAFE's and CAFÉ's with Investment Consulting Services	Rich Lynch, AIFA® Dick Smith, AIFA®	Grand Ballroom A
		Regulatory Hot Topics	Brian Hamburger, AIFA®	Grand Ballroom C-D
		A Practical Understanding of Fiduciary Exposure for Investment Professionals	Gary Sutherland Tom Schrandt	Grand Ballroom B
		Advanced fi360 Tools Session Portfolio Optimization utilizing New Frontier Advisors' Resampled Efficiency ™	Andy Frommeyer, AIF® Dave Palascak, AIF® Mike Limbacher, AIF®	Tryon Room
	11:15 – 12:15	Fiduciary responsibility surrounding terminal funding of DB plans	Brian Hubbell, AIF®	Grand Ballroom B
		Attorneys and Accountants as Partners in the Fiduciary Cause	Clark Blackman, AIF® Fred Reish, AIFA®	Grand Ballroom C-D
		Behavioral Economics	Darrin Farrow, AIF®	Grand Ballroom A
		Advanced fi360 Tools Session Defining Selection & Monitoring Criteria from Investment Policy Statement through Reporting	Andy Frommeyer, AIF® Dave Palascak, AIF® Mike Limbacher, AIF®	Tyron Room
	12:15 – 1:15	*Lunch*		*Providence Ballroom*
		Qualified Default Investment Alternatives	Lou Harvey Don Trone, AIFA®	Grand Ballroom C-D
		The Role of the Investment Committee	Peter Preovolos, AIFA® Rocco DiBruno, AIFA® Lauren Lenfest, AIFA® Monica Garver, AIF®	Grand Ballroom A

	A Debate on 404c Concepts and Compliance	David Witz, AIF® Greg Kasten, AIFA® Robert VandeVrede, AIFA®	Grand Ballroom B
	Basic fi360 Tools Session	Andy Frommeyer, AIF® Dave Palascak, AIF® Mike Limbacher, AIF®	Tryon Room
3:00 – 3:20	*Networking Break*		*Grand Promenade*
3:30 – 4:30	Utilizing the media to raise awareness and demonstrate expertise in the fiduciary space	Mary Ann Miller, APR (PR for fi360) Mike Patton Neil Anderson	Grand Ballroom C-D
	Implementing Process in Your Business	Spenser Segal, AIFA®	Grand Ballroom B
	CEFEX has Changed the Way Fiduciaries Select Providers	Ron Hagan, AIFA®	Grand Ballroom A
	Advanced fi360 Tools Session Using the Analyzer to Conduct Investment Research, Comparisons, and Reports	Andy Frommeyer, AIF® Dave Palascak, AIF® Mike Limbacher, AIF®	Tryon Room
5:00 – 6:30	*Networking Reception*		*Grand Promenade*

FRIDAY
MAY 9, 2008

TIME	*EVENT*	*SPEAKER*	*LOCATION*
7:00 – 7:50	*Continental Breakfast*		*Providence Ballroom*
8:00 – 9:00	**The Regulation that is Going to "Rock Our World" – The Impact of the DOL's new 408(b)(2) Regulation**	**Fred Reish, AIFA®**	**Grand Ballroom C-D**
9:15 – 10:15	Contrasting Broker Dealers with RIAs	Mike Patton	Grand Ballroom B
	Does SRI = Lower Returns .... *think again*! See how the '2004 PLANSPONSOR of the Year' does it.	Don Rogers Dave Zellner	Grand Ballroom C-D
	The Evolution of Fiduciary Standards: From process to thought process	Wayne Miller	Grand Ballroom A
	Advanced Tools Session Customizing, Producing, & Interpreting Performance & Monitoring Reports	Andy Frommeyer, AIF® Dave Palascak, AIF® Mike Limbacher, AIF®	Tryon Room
10:15 – 10:35	*Networking Break*		*Grand Promenade*
10:45 – 12:15	Fees and Expenses: The Transparency Debate	Jim Culbreth David Witz, AIF® Brian Hubbell, AIF®	Grand Ballroom A
	Fiduciary Safe Harbors	Fred Reish, AIFA® Lou Harvey	Grand Ballroom C-D

	Fiduciary Responsibilities in Managing Investment Advisors ... from 3 clients' perspectives.	Don Rogers Kenneth Gassman Roland Oliver	Grand Ballroom C
	Basic fi360 Tools Session	Andy Frommeyer, AIF® Dave Palascak, AIF® Mike Limbacher, AIF®	Tryon Room
12:15 – 1:15	*Lunch*		*Providence Ballroom*
1:30 – 2:30	403b Changes and Opportunities	Robb Smith, AIFA®	Grand Ballroom C-D
	Expert Witness Series – The Written Report	Stuart Ober, AIFA® Jeff Schaff, AIFA®	Grand Ballroom B
	Hedge Fund Case Study	Susan Mangiero AIFA® Nir Yarden Noah Weissman	Grand Ballroom A
	Advanced fi360 Tools Session Creating a Proposal for a Prospective Client	Andy Frommeyer, AIF® Dave Palascak, AIF® Mike Limbacher, AIF®	Tyron Room
2:45 – 3:45	**“The Better Mousetrap” Portfolio Optimization Using Resampled Efficiency™**	**Dr. Richard Michaud Robert Michaud**	**Grand Ballroom C-D**
4:00 – 4:30	**Closing Remarks**	**fi360 Leadership**	**Grand Ballroom C-D**