

<b>TUESDAY</b>			
<b>MAY 5, 2009</b>			
<b>TIME</b>	<b>EVENT</b>		<b>LOCATION</b>
1:00 – 5:00	Capstone Accredited Investment Fiduciary® (AIF®) Program (Part I)		Cushing A & B

<b>WEDNESDAY</b>			
<b>MAY 6, 2009</b>			
<b>TIME</b>	<b>EVENT</b>		<b>LOCATION</b>
8:00 – 12:00	Capstone Accredited Investment Fiduciary® (AIF®) Program (Part II)		Cushing A & B
1:00 – 5:00	Fi360 Toolkit Interactive Workshop ( <b>SOLD OUT</b> )		Cushing A & B
12:00 – 4:45	Conference Registration		Sitgreaves Room
5:00 – 6:00	Conference Registration		Marshall's Outpost Pavilion & Lawn
5:00 – 6:00	Welcome Reception		Marshall's Outpost Pavilion & Lawn

<b>THURSDAY</b>			
<b>MAY 7, 2009</b>			
<b>TIME</b>	<b>EVENT</b>	<b>SPEAKER</b>	<b>LOCATION</b>
7:00 – 12:00	Conference Registration		Culturekeepers Registration
7:00 – 8:00	Continental Breakfast		Culturekeepers Hall West
8:00 – 8:30	Welcome Industry Outlook	Rich Lynch, AIFA Blaine Aikin, AIFA	Kierland Ballroom 2 & 3
8:30 – 9:45	New Laws, More Regulations and Fiduciary Trends: Where Are We Going?	Fred Reish, AIFA	Kierland Ballroom 2 & 3
9:45 – 10:15	Break		
10:15 – 11:15	Compliance Mythbusters: Proving and Dispelling the Greatest Myths of Regulatory Compliance	Brian Hamburger, AIFA	Kierland Ballroom 1B
	Multiple-Asset-Class Investing: Is it Still Relevant in Today's Market?	Roger Gibson	Kierland Ballroom 2 & 3
	A Prudent Expert Standard of Care: What now?	Wayne Miller	Kierland Ballroom 4A
	Using the fi360 Toolkits to win new business	Dave Palascak, AIF	Kierland Ballroom 1A
11:30 – 12:30	Protecting Private Wealth: A Call To Action for Global Families, Trusted Advisors	Charles Lowenhaupt	Kierland Ballroom 1B
	Problems and Opportunities in Managing Endowments for Nonprofits: Insight from the Commonfund Benchmarks Studies	John Griswold, AIF	Kierland Ballroom 4A
	Becoming A Sought-After Media Expert: Leverage the Power of Public Relations	Jennifer Connelly Bob Clark	Kierland Ballroom 2 & 3
	Using the fi360 Monitoring System	Dave Palascak, AIF	Kierland Ballroom 1A
12:30 – 1:45	Lunch		Trailblazers Terrace
1:45 – 3:00	Emerging Trends of Investment Committees	Ron Hagan, AIFA Lauren Lenfest, AIFA Rick Applegate, AIFA	Kierland Ballroom 1B
	Managing risk with improved documentation and business practices	Rich Lynch, AIFA Susan Mangiero, AIFA Fred Reish, AIFA	Kierland Ballroom 4A
	Fiduciary Consulting Business Models	Mike Dicenso, AIF Ed Lynch, AIFA Stuart Ober, AIFA	Kierland Ballroom 2 & 3

3:00 – 3:30	<i>Break</i>		
3:30 – 4:45	Fee Benchmarking	David Witz, AIF Tom Kmak	Kierland Ballroom 1B
	Unique approaches to servicing clients with a fiduciary best practices viewpoint	Al Otto, AIFA Mike Dicenso, AIF	Kierland Ballroom 4A
	Ramifications of the Current Economic and Market Turmoil on Asset Allocation: Is it Now Time for Managed Accounts?	Blaine Aikin, AIFA Roger Gibson Marcia Wagner	Kierland Ballroom 2 & 3
	Fi360 Toolkits for Beginners	Mike Limbacher, AIF	Kierland Ballroom 1A
5:00 – 6:30	<i>Networking Reception</i>		<i>Vista Morado (outside Culturekeepers Hall West)</i>

<b>FRIDAY</b>					
<b>MAY 8, 2009</b>		<b>TIME</b>	<b>EVENT</b>	<b>SPEAKER</b>	<b>LOCATION</b>
	7:00 – 8:00	<i>Continental Breakfast</i>			<i>Trailblazers Terrace</i>
	8:00 – 9:15	Planning in Mayhem	Bob Veres	Kierland Ballroom 2 & 3	
9:30 – 10:30	Ethics, Professionalism, and the Economic Crisis	Dr. Robert Kennedy	Kierland Ballroom 2 & 3		
	Learning from over 120 CEFEX Assessments	Carlos Panksep Matt Hutcheson	Kierland Ballroom 4A		
	Why you need to be in the Cash Balance Business	Daniel Kravitz	Kierland Ballroom 1B		
	10:30 – 11:00	<i>Break</i>			
11:00 – 12:15	Reports of Target Date's Death Have Been Greatly Exaggerated -- Analyzing the Success of Target Date Funds	Joseph Gordon, AIF Dave Musto Fred Reish, AIFA	Kierland Ballroom 1B		
	Fiduciary Participant Advice (PPA): Can It Work in Your Practice and How Do You Manage the Fiduciary Liability	Chad Griffith, AIF Ed Lynch, AIFA Rich Lynch, AIFA Marcia Wagner	Kierland Ballroom 2 & 3		
	Top 10 Tips for Marketing Your Financial Practice Grow Your Business by Promoting Your Designation	Sam Richter	Kierland Ballroom 4A		
	Fi360 Toolkits for Beginners	Mike Limbacher, AIF	Kierland Ballroom 1A		
	12:30 – 1:45	<i>Lunch</i>			<i>Trailblazers Terrace</i>
1:45 – 2:45	Behavior Gap	Carl Richards	Kierland Ballroom 4A		
	Answers to 5 liability questions which will save you money, time & headaches	Gary Sutherland Tom Schrandt	Kierland Ballroom 1B		
	ERISA Litigation Matters and Evolving Best Practices	Marcia Wagner	Kierland Ballroom 2 & 3		
	How to Save Time with the fi360 Toolkits	Dave Palascak, AIF	Kierland Ballroom 1A		
3:00 – 4:00	Active Intervention to Improve the Retirement Outcome	Greg Kasten, AIFA	Kierland Ballroom 1B		
	From Process to Profits: How a systematized business enables fiduciary excellence, enhances your value proposition, and drives revenue.	Spencer Segal, AIF	Kierland Ballroom 4A		
	Ignorance is NOT Bliss: The Sad State of 401(k) Fee Disclosure and What You Must Do About It!	Josh Itzoe, AIF	Kierland Ballroom 2 & 3		
4:00	CONFERENCE ADJOURNS				