

**FI360**  
Accredited Investment Fiduciary®  
Capstone Program Classroom Session Agenda

\*Sample\*

---

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