

AIF® and AIFA® Designation Renewal Guidelines and Continuing Education Requirements

The purpose of this document is to:

- Describe the designation renewal process, including details on reinstatement for individuals wishing to reactivate their designation status after having been inactive; and
- Specify the continuing education requirements of each designation.

Designation Renewal

As an AIF® or AIFA® designee, you annually must:

- Remit payment of your designation dues;
- Affirm your conformance with the Designee Code of Ethics; and
- Complete the appropriate amount of continuing education (“CE”) hours.

These requirements are in place to demonstrate to the public that AIF and AIFA designees are proactive in understanding their fiduciary responsibilities and being leaders in the fiduciary community. Failure to comply with the ongoing designation requirements will result in a suspension of the right to use the designation.

The date indicated on your designation certificate and renewal application is your official designation date. It serves as your annual renewal date. Each year a notification will be sent to each designee prompting renewal.

Designee Reinstatement

If a designee becomes inactive, certain requirements must be completed to regain active status and approval to use the designation. The details of the reinstatement requirements are described below and are based on the length of time the designee has been inactive.

Note: Upon reinstatement to active status, the official designation date does not change. Future renewals will be due annually on the original designation date.

To return to active designee status **after less than one year of inactivity:**

- Complete any outstanding CE hours and submit the CE Credit Form found in the Designee Portal before completing the reinstatement form.
- Submit the reinstatement form with the \$100 reactivation fee and \$325 designation dues (if not previously submitted).

To return to active designee status **after more than one year of inactivity:**

- Complete the CE hours required during the last calendar year and submit the corresponding CE Credit Forms found in the Designee Portal before completing the reinstatement form. CE hours for the current year also will need to be completed by the next renewal date.
- Submit the reinstatement form with the \$100 reactivation fee and \$325 designation dues.

To return to active designee status **after more than three years of inactivity:**

- Complete the CE hours required during the last **two** calendar years and submit the corresponding CE Credit Forms found in the Designee Portal before completing the reinstatement form. CE hours for the current year also will need to be completed by the next renewal date.
- Submit the reinstatement form with the \$100 reactivation fee and \$325 designation dues.

To return to active designee status **after more than five years of inactivity:**

- The individual must retake the appropriate training program(s) at full price.

CE Requirements for the AIF and AIFA Designations

Note: Fi360’s designation continuing education hours, sources, and reporting policies and procedures changed in 2008. You can find additional information about the updated continuing education (CE) requirements in the Designee Portal. To login, visit www.fi360.com.

AIF and AIFA designees are required to complete continuing education according to the chart below. You may choose both fi360-created CE and outside sources of CE. Please note, fi360 does not pre-approve outside continuing education and does not have an approved provider list. We trust that you will select CE that contributes to your professional development in the fiduciary arena.

You are responsible for tracking and reporting your CE requirements. There is an area on your renewal form to record the method of completion of your requirements. Fi360 will conduct random audits of renewal forms to check for CE completion to ensure the integrity of the CE reporting system.

	AIF Designation	AIFA Designation
Hours required per year:	6 hours	10 hours
Options for meeting the requirements:	The fi360 annual conference	The fi360 annual conference
	Online CE produced by fi360	Online CE produced by fi360
	Participate in CEFEX Certification team or as a Liaison Officer at firm being certified. (Max of 3 hours/year allowed)	Participate in CEFEX Certification team or as a Liaison Officer at firm being certified. (Max of 5 hours/year allowed)
	Relevant events produced by sources outside of fi360 (Max of 2 hours/year allowed)	Relevant events produced by sources outside of fi360 (Max of 4 hours/year allowed)



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Fi360 Annual Conference

A designee who attends the annual fi360 Conference fulfills all continuing education requirements for his or her next renewal. The annual conference is a great opportunity to attend presentations from industry leaders, meet experts from the field, network with other professionals from around the country, and discover new ways to improve your fiduciary services.

Archived CE Recordings

Audio of individual sessions from the fi360 conference will be recorded and made available as a source of CE credit, each worth one hour of CE, available in the Designee Portal. All designees receive an email when new recordings are posted. Access to these recordings is included as part of your designation dues.

Web-based AIF training program

Receive six hours of CE credit for enrolling in the revised Web-based AIF program for only \$250 (\$1,450 for non-designees). You will not be required to take the final exam, but you must complete all modules to receive credit. To enroll with the discounted price, go to the Designee Portal's Continuing Education tab to get the discount code and enroll.

Conduct or participate in a CEFEX Certification

Lead analysts (AIFA designees), designees on a team conducting a CEFEX Certification, or the Liaison Officers at a firm being certified are eligible for up to half of their continuing education requirements for AIF and AIFA designation renewal. Each designee should provide the CEFEX Registration Number on his or her renewal application. No exceptions will be made to this policy, and individuals may not pass credit to another designee.

Questions?

If you have any questions, please feel free to contact us at any time by email: designations@fi360.com or by phone: 412-221-0292 local or 866-390-5080 toll-free.

Kind regards,

fi360 Designations Team

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