



Accredited Investment Fiduciary Analyst®

Program Agenda*

Location

Date

Day One

8:30 – 9:00 a.m.

Welcome

- Course Objectives
- Designation marks and Company overview
- Instructor introduction and bios

9:00– 10:15 a.m.

Introduction

- The concept of a Global Fiduciary Standard of Excellence and the Leadership Quotient
- Legal issues and regulatory oversight review
- Global Fiduciary Precepts and Fiduciary Quality Management System
- International Organization for Standardization and fi360's ISO-like approach
- Assessments – their meaning and limitations

10:15 – 10:30 a.m.

Break

10:30 – 11:00 a.m.

Introduction (continued)

11:00 – 12:00 a.m.

Steward Case Study Exercise # 1: CAFE Part I

12:00 – 1:00 p.m.

Lunch

1:00 – 1:30 p.m.

Exercise # 1 continued

1:30 – 2:00 p.m.

Exercise # 1: Report Out

2:00 – 3:00 p.m.

Exercise # 2: CAFE Part II

3:00 – 3:15 p.m.

Break

3:15 – 5:30 p.m.

Exercise # 2 continued

Day Two

8:30 – 9:00 a.m. **Exercise # 2: Report Out**

9:00 – 10:15 a.m. **Exercise # 3: CAFE Part III, OFIs/NCRs**

10:15 – 10:30 a.m. *Break*

10:30 – 11:00 a.m. **Exercise # 3 continued**

11:00 – 11:30 a.m. **Exercise # 3: Report Out**

11:30 – 12:00 p.m. **Exercise # 4: Present Findings**

12:00 – 1:00 p.m. *Lunch*

1:00 – 2:00 p.m. **Exercise # 4 continued**

2:00 – 2:30 p.m. **Exercise # 4: Report Out**

2:30 – 3:00 p.m. **Exercise # 5: Schedules A & C**

3:00 – 3:15 p.m. *Break*

3:15 – 5:00 p.m. **Exercise # 5 continued**

5:00 – 5:30 p.m. **Quiz**

Day Three

8:30 – 9:30 a.m. **CEFEX Assessments**

9:30 – 10:15 a.m. **Advisor Case Study Exercise # 6: CAFE Parts I-III**

10:15 - 10:30 a.m. *Break*

10:30 – 12:00 p.m. **Exercise # 6 continued**

12:00 – 1:00 p.m. *Lunch*

1:00 – 1:30 p.m. **Exercise # 6: Report Out**

1:30 – 2:30 p.m. **Exercise # 7: Schedule B**

2:30 – 3:00 p.m. **Wrap-up and Review**

3:00 – 3:15 p.m. *Break*

3:15 – 4:45 p.m. **AIFA Examination**

**We are currently revising the case studies and this agenda may be changed to accommodate any revisions.*