fi360® Conference

INSIGHTS2014

Nashville Tennessee

Fostering A Higher Standard of Fiduciary Excellence

Tuesday, April 22

TIME	EVENT	LOCATION
8:30 – 5:30	AIFA Designation Training	Cumberland 1

Wednesday, April 23

TIME	EVENT	LOCATION
8:30 – 5:30	AIFA Designation Training	Cumberland 1
1:00 – 5:30	AIF Designation Training	Cumberland 3
8:30 – 5:30	401(k) Service Training Program	Cumberland 4

Thursday, April 24

TIME	EVENT	LOCATION
8:30 – 5:30	AIFA Designation Training	Cumberland 1
8:00 – 12:00	AIF Designation Training	Cumberland 3
8:30 – 5:30	401(k) Service Training Program	Cumberland 4
8:00 – 5:00	CEFEX Analyst Training	Cumberland 5
1:00 – 4:00	**Toolkit Sessions**	
	FI360 TOOLKIT SESSIONS: Taking Your First Steps	Legends Ballroom C
	FI360 TOOLKIT SESSIONS: Rising to the Next Level	Legenda Ballroom G
12:00 – 4:30	Registration Opens for INSIGHTS 2014	5th Ave. Prefunction
5:30 – 8:00	***Country Music Welcome*** - Tour & Reception	Country Music Hall of Fame (Omni Lobby entrance)

Friday, April 25

TIME	EVENT	SPEAKER	LOCATION
7:00 – 8:00	Continental breakfast		Legends Ballroom
7:00 – 8:00	fi360 Conference registration		TBA
8:00 – 9:00	Opening Remarks	Blaine Aikin and Rich Lynch	Broadway Ballroom E-K
9:00 – 10:00	Wikinomics and Financial Services	Anthony Williams	Broadway Ballroom E-K
10:00 – 11:00	**Insights Xchange**		
10:00 – 10:15	Networking | Break		
10:15 – 10:45 (Optional Sessions, does not qualify for CE)	**fi360 Team:** Looking Ahead at the New fi360 Software Application		Broadway F
	fi360 Team: Using the fi360 Toolkit in My Practice		Broadway G
	fi360 Team: AIF: Cross Your T's and Dot Your I's: Get your designation out there		Broadway E
	Ann Schleck & Co: Competing in the New World of Fee Disclosure		Broadway A
10:45 – 11:00	Networking | Break		
11:00 – 12:00	**Conference Breakout Sessions**		
	The Intergenerational Transfer of Wealth and Divided Trusteeship	Gene Maloney	Broadway F
	Liability Relative Optimization: Begin with the End in Mind, Optimal Portfolios for the Long Run **[Master's Track]**	David Blanchett	Broadway A
	Building a Fiduciary Practice	Scott Reed, Ken Mathis	Broadway G
	Best Behavioral Finance Practices	Chip Hardy, Cathy Smith	Broadway E
12:00 – 1:00	Lunch		Legends Ballroom
1:00 – 2:00	**Conference Breakout Sessions**		
	Breaking Down the Many Fiduciary Roles, Obligations and Service Models Today	Greg Kasten	Broadway F
	Based on, "A Framework for Examining Asset Allocation Alpha" **[Master's Track]**	Dr. Omid Shakernia	Broadway A
	Evaluating and Recommending Bond and Stable Value Funds for 401k Plans Ahead of a Rising Interest Rate Environment	Steven Kaye, Aldo Vultaggio	Broadway G
	Life Insurance Made Understandable	Brian Fechtel	Broadway E
2:00 – 2:15	Networking | Break		

Friday, April 25

2:15 – 3:15	**Conference Breakout Sessions**		
	Behavior Gap	Carl Richards	Broadway F
	Mission-Driven SRI Investing Strategies for Small Institutions **[Master's Track]**	Johann Klaassen, Kimberly Kiel	Broadway A
	Hard to Value Assets	John Hare, Charles Humphrey, Susan Mangiero, Michelle Sullivan	Broadway G
	The Increasingly Regulated World of IRA Rollovers, and What to Do About It	Fred Reish	Broadway E
3:15 – 4:15	**Insights Xchange**		
3:15 – 3:30	Networking | Break		
3:30 – 4:00 (Optional Sessions, does not qualify for CE)	Exciting Update to be Announced Soon!		Broadway F
	CEFEX: Bringing Fiduciary Certification to Your Steward		Broadway G
	INVITATION ONLY EVENT **fi360 Team:** Product Enhancement Round Table for IPS Advisor Pro Users		Broadway A
	Financial Service Standards: The Professional Plan Consultant Designation, Practical Application of the Practices to a Retirement Plan Practice		Broadway E
4:00 – 4:15	Networking | Break		
4:15 – 5:15	**Conference Breakout Sessions**		
	ERISA Update and the Impact on Advisers	Fred Reish	Broadway F
	Tactical Asset Allocation with Macroeconomic Factors **[Master's Track]**	Michael Phillips, James Chong	Broadway A
	Integrating New Approaches in Socially Responsible Investing with Fiduciary Global Best Practices	Robert Patterson, Steve Lydenberg	Broadway G
	The Tao of Participant Services	Craig Wantanabe	Broadway E
5:30– 7:30	INSIGHTS 2014: *Decade of INSIGHTS* Celebration		Broadway Ballroom Prefunction

Saturday, April 26

TIME	EVENT	SPEAKER	LOCATION
7:00 – 8:00	Continental breakfast		Legends Ballroom
8:00 – 9:00	Creative Confidence	Tom Kelley	Broadway Ballroom E-K
9:00 – 10:00	**Insights Xchange**		
9:00 - 10:00	Kelley Book Signing		TBA
9:00 – 9:15	Networking | Break		
9:15 – 9:45 (Optional Sessions, does not qualify for CE)	*INVITATION ONLY EVENT* **fi360 Team:** Product Enhancement Round Table for existing Toolkit Users		Broadway A
	IPS AdvisorPro: Investment Policy Statements: Is a word file good enough?		Broadway F
	fi360 Team: How Allodium Leverages the AIF Designation as an Independent, Fee-Only RIA		Broadway E
	Financial Service Standards: The 401(k) Service Solution, Learn About This Complete, Turn-Key Service Process		Broadway G
9:45 – 10:00	Networking | Break		
10:00 – 11:00	**Conference Breakout Sessions**		
	Handling Difficult Investment Policy Issues **[Master's Track]**	Norm Boone, Linda Lubitz Boone	Broadway F
	How 3 Minutes can be Worth $1 Billion **[Master's Track]**	Richard Dunne	Broadway A
	Fee Allocation Policies: Best Practices for Plan Fiduciaries	Jason Roberts, Gerald Wernette, Jon Blaze	Broadway G
	Tax Efficient Investments	Brian Laible	Broadway E
11:00 – 11:15	Networking | Break		
11:15 – 12:15	**Conference Breakout Sessions**		
	Trending Topics for Independent Investment Advisors	Dan Bernstein	Broadway F
	Open and Close - Sales Ideas for Winning Retirement Plans **[Master's Track]**	Ann Schleck & Michael Muirhead	Broadway A
	Using Liquid Alternatives Effectively in DC and DB plans	Steve Medina	Broadway G
	Retirement Plans and Financial Planning - Under One Roof	Richard Busillo, Jeff Weiand, Beth Davies	Broadway E
12:15 – 1:15	Lunch		Legends Ballroom

Saturday, April 26

TIME	EVENT	SPEAKER	LOCATION
1:15 – 2:15	**Conference Breakout Sessions**		
	Transition Expertise Matters for Fiduciaries	Susan Bradley	Broadway F
	Custom TDFs **[Master's Track]**	Joan Neri	Broadway A
	What's in Your Portfolio? Risk Management and Monitoring of Multi-Asset Class and Multi-Manager Investment Portfolios	Matthew Wright	Broadway G
	Leveraging Technology to Improve Retirement Plan Participation and Participant Outcomes	Jessica Searcy-Maldonado	Broadway E
2:15 – 2:30	Networking | Break		
2:30 – 3:30	**Conference Breakout Sessions**		
	Outsourced CIO - What's Good for the Client?	Roger Levy	Broadway F
	Your Duty to Care: Risk Tolerance and What You Need to Know as a Fiduciary	Tyler Nunnally	Broadway A
	Plan Failure Risk is the New Fiduciary Risk: Opportunities for Advisors	Shelby George	Broadway G
	3(16) and the Fiduciary Plan Administrator: The Next Number to Decode	Kimberly Shaw-Elliott, Keith Gredys	Broadway E
3:30	Conference adjourns		