AIF® Designation Training
Capstone Format

Boston, MA

April 23, 2020

Metro Meeting Centers Boston
101 Federal Street, 4th floor, Boston, MA 02110

Instructor: J. Richard Lynch, AIFA®

7:30 a.m. – 8:00 a.m.	Breakfast & Registration
8:00 a.m. – 9:30 a.m.	Introduction
9:30 a.m. – 9:45 a.m.	Break
9:45 a.m. – 10:45 a.m.	Stewards & Advisors Step 1: Organize
10:45 a.m. – 12:00 p.m.	Stewards & Advisors Step 2: Formalize
12:00 p.m. – 1:00 p.m.	Lunch
1:00 p.m. – 2:00 p.m.	Stewards & Advisors Step 3: Implement
2:00 p.m. – 2:15 p.m.	Break
2:15 p.m. – 3:15 p.m.	Stewards & Advisors Step 4: Monitor
3:15 p.m. – 3:30 p.m.	Review and Wrap-up
3:30 p.m. – 5:30 p.m.	AIF® Designation Examination