



AIF[®] Designation Training Capstone Format

Classroom Session Agenda
Fi360 – Austin, TX – May 16-17, 2020
Instructor: Keith Loveland, JD, AIFA[®], CIDA[®]

Day 1 – May 16

1:00 p.m. – 2:15 p.m.	Introduction
2:15 p.m. – 2:30 p.m.	Break
2:30 p.m. – 3:30 p.m.	Stewards and Advisors Step 1: Organize
3:30 p.m. – 4:45 p.m.	Stewards and Advisors Step 2: Formalize
4:45 p.m. – 5:00 p.m.	Break
5:00 p.m. – 5:30 p.m.	Stewards and Advisors Step 3: Implement

Day 2 – May 17

7:15 a.m. – 8:00 a.m.	Breakfast
8:00 a.m. – 9:00 a.m.	Stewards and Advisors Step 3: Implement (cont.)
9:00 a.m. – 9:45 a.m.	Stewards and Advisors Step 4: Monitor
9:45 a.m. – 10:00 a.m.	Break
10:00 a.m. – 10:30 a.m.	Review and Wrap Up
10:30 a.m. – 12:30 p.m.	AIF [®] Designation Examination
12:30 p.m. – 1:30 p.m.	Lunch
