



## Accredited Investment Fiduciary Analyst®

Program Agenda  
Minneapolis, MN  
October 14-16, 2019

### Day One - October 14

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<b>11:00 a.m. - 11:30 a.m.</b>	<b>Welcome</b> <ul style="list-style-type: none"><li>• Course Objectives</li><li>• Designation marks and Company overview</li><li>• Instructor introduction and bios</li></ul>
<b>11:30 a.m. - 1:00 p.m.</b>	<b>Introduction</b> <ul style="list-style-type: none"><li>• The concept of a Global Fiduciary Standard of Excellence</li><li>• Legal issues and regulatory oversight review</li><li>• Global Fiduciary Precepts and Fiduciary Quality Management System</li><li>• International Organization for Standardization and fi360's ISO-like approach</li><li>• Assessments - their meaning and limitations</li></ul>
<i>1:00 p.m. - 2:00 p.m.</i>	<i>Lunch</i>
<b>2:00 p.m. - 2:30 p.m.</b>	<b>Introduction (continued)</b>
<b>2:30 p.m. - 3:30 p.m.</b>	<b>Steward Case Study Exercise # 1: CAFE Part I</b>
<b>3:30 p.m. - 4:00 p.m.</b>	<b>Exercise # 1: Report Out</b>
<i>4:00 p.m. - 4:15 p.m.</i>	<i>Break</i>
<b>4:15 p.m. - 6:00 p.m.</b>	<b>Exercise # 2: CAFE Part II</b>

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### Day Two - October 15

<i>7:15 a.m. - 8:00 a.m.</i>	<i>Breakfast</i>
<b>8:00 a.m. - 10:00 a.m.</b>	<b>Exercise # 2 continued</b>
<i>10:00 a.m. - 10:15 a.m.</i>	<i>Break</i>
<b>10:15 a.m. - 10:45 a.m.</b>	<b>Exercise # 2 Report Out</b>
<b>10:45 a.m. - 12:00 p.m.</b>	<b>Exercise # 3: CAFE Part III, OFIs/NCRs</b>
<i>12:00 p.m. - 1:00 p.m.</i>	<i>Lunch</i>
<b>1:00 p.m. - 2:00 p.m.</b>	<b>Exercise # 3 continued</b>
<b>2:00 p.m. - 2:30 p.m.</b>	<b>Exercise #3: Report Out</b>
<b>2:30 p.m. - 3:30 p.m.</b>	<b>Exercise # 4: Present Findings</b>
<i>3:30 p.m. - 3:45 p.m.</i>	<i>Break</i>
<b>3:45 p.m. - 4:30 p.m.</b>	<b>Exercise # 4: Report Out</b>
<b>4:30 p.m. - 5:30 p.m.</b>	<b>Exercise # 5: Schedules A, B &amp; C</b>
<b>5:30 p.m. - 6:00 p.m.</b>	<b>Quiz</b>



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### Day Three - October 16

<i>7:15 a.m. - 8:00 a.m.</i>	<i>Breakfast</i>
<b>8:00 a.m. - 9:00 a.m.</b>	<b>Exercise # 5 continued</b>
<b>9:00 a.m. - 10:00 a.m.</b>	<b>CEFEX Assessments</b>
<i>10:00 a.m. - 10:15 a.m.</i>	<i>Break</i>
<b>10:15 a.m. - 12:00 p.m.</b>	<b>Advisor Case Study Exercise # 6: CAFE Parts I-III</b>
<i>12:00 p.m. - 1:00 p.m.</i>	<i>Lunch</i>
<b>1:00 p.m. - 2:00 p.m.</b>	<b>Exercise # 6 continued</b>
<b>2:00 p.m. - 2:30 p.m.</b>	<b>Exercise # 6: Report Out</b>
<b>2:30 p.m. - 3:00 p.m.</b>	<b>Wrap-up and Review</b>
<b>3:00 p.m. - 4:30 p.m.</b>	<b>AIFA Examination</b>