



AIF[®] Designation Training Capstone Format

San Jose, CA

February 25, 2020

Hotel De Anza
233 W Santa Clara St, San Jose, CA 95113

Instructor: Rich Lynch



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

