AGENDA

MONDAY, APRIL 15

TIME	EVENT	LOCATION
8:30 – 5:30	AIFA Designation Training	Powell A

TUESDAY, APRIL 16

TIME	EVENT	LOCATION
8:30 – 5:30	AIFA Designation Training	Powell A
1:00 – 5:30	AIF Designation Training	Powell B

WEDNESDAY, APRIL 17

TIME	EVENT	LOCATION
8:30 – 4:45	AIFA Designation Training	Powell A
8:00 – 12:00	AIF Designation Training	Powell B
8:00 – 5:00	CEFEX Analyst Training	Cushing B
12:00 – 4:30	Conference Registration	Culturekeepers Registration
1:00 – 3:30	fi360 Toolkit Workshop: Common applications of the fi360 Toolkit for Advisors	Kierland Ballroom 4A
	fi360 Toolkit Workshop: Common applications of the fi360 Toolkit for Service Providers	Kierland Ballroom 4B
4:00 – 5:00	fi360 Tools Workshop: What's new and what's needed for the fi360 Toolkit for Advisors	Kierland Ballroom 4A
	fi360 Tools Workshop: What's new and what's needed for the fi360 Toolkit for Service Providers	Kierland Ballroom 4B
5:30 – 7:00	Welcome cocktail reception for conference attendees	Marshall's Outpost Pavilion

THURSDAY, APRIL 18

TIME	EVENT	SPEAKER	LOCATION
7:00 – 8:00	Continental breakfast		Trailblazer's Ballroom
	Conference Registration		Culturekeepers Registration
8:00 – 8:45	Welcome to the 2013 fi360 Conference	Rich Lynch	Kierland Ballroom 1-3
8:45 – 10:00	Trust Relationships at a Crossroads: a Conversation Regarding the Current and Future State of Fiduciary Affairs	Blaine Aikin, Gene Maloney, Ron Rhoades, Skip Schweiss	Kierland Ballroom 1-3
10:00 – 10:30	Networking Break		
	fi360 Toolkit Lounge: Develop and maintain a recommended investment list		Hall of State
10:30 – 11:30	Brokers Were Fiduciaries in the 1930's, and Remain Fiduciaries Now	Ron Rhoades	Kierland Ballroom 3
	Alpha, Beta, and now...Gamma **[Master's Track]**	David Blanchett	Kierland Ballroom 4
	Getting a DB Plan out of Neutral	Dan Cassidy, David Kershner	Kierland Ballroom 1
	Step by Step Guide to Growing your Practice using the fi360 Toolkit	Jason Gordo	Kierland Ballroom 2
11:30 – 1:00	Lunch		Trailblazer's Ballroom
12:30 – 1:00	fi360 Toolkit Lounge: Create and deliver comprehensive model portfolio reports		Hall of State
1:00 – 2:00	The Adviser's Role in a 408(b)(2) Prudent Process . . . and in the Implementation of Decisions	Fred Reish	Kierland Ballroom 2
	Due Diligence for Alternative Investments **[Master's Track]**	Ed Lynch, Susan Mangiero, Michelle Sullivan, Charles Humphrey	Kierland Ballroom 4
	Retirement Plans, the Wizard of Oz and You: Understanding the Ethical Imperative of Fiduciary Responsibility	Mark Mensack	Kierland Ballroom 1
	Trending Legal and Regulatory Issues for Investment Advisers	Daniel Bernstein	Kierland Ballroom 3

TIME	EVENT	SPEAKER	LOCATION
2:15 – 3:15	About to Get the Best of Me	Scott Reed, Sharon Pivirotto	Kierland Ballroom 2
	Economics of Retirement Plan Profitability **[Master's Track]**	Anders Smith	Kierland Ballroom 4
	Regulatory Compliance: Targeting Solutions for Your Clients' Greatest Challenges	Jason Roberts	Kierland Ballroom 3
	Fiduciary Strategies to Protect and Grow your Organizations, Focusing on Foundations and Endowments	Douglas Rothermich, Kevin O'Leary, Ero Johnson	Kierland Ballroom 1
3:15 – 3:45	Networking Break		
	fi360 Toolkit Lounge: Build seamless investment proposals to win new business		Hall of State
3:45 – 4:45	Participant Disclosures: Where Advisors Need to be Involved	Fred Reish	Kierland Ballroom 3
	Understanding the "Cost" of Guaranteed Lifetime Income Options **[Master's Track]**	David Blanchett	Kierland Ballroom 4
	How AIFA Designees can use the new CEFEX Service Provider Disclosure Review (SPDR) to help plan stewards ensure reasonableness of fees under 408(b)(2)	Joseph Gordon, Mario Giganti	Kierland Ballroom 1
	Evaluating & Vetting Advisors: A Mock Plan Sponsor Committee Meeting	Tom Schrandt, Jason Roberts, Gary Sutherland, Kimberly Shaw Elliot	Kierland Ballroom 2
5:00 – 6:30	Networking Reception		Vista Morada

FRIDAY, APRIL 19

TIME	EVENT	SPEAKER	LOCATION
7:00 – 8:00	Continental breakfast		Trailblazer's Ballroom
7:40 – 8:00	fi360 Toolkit Lounge: How the fi360 Toolkit has helped my firm		Hall of State
8:00 – 9:00	The Signal and the Noise – How advisors should value predictions, filter out unreliable data, and incorporate useful data into their activities.	Nate Silver	Kierland Ballroom 1-3
9:00 – 9:30	Nate Silver book signing		
	Networking Break		
	fi360 Toolkit Lounge: Efficiently manage your watch list at a global and client-specific level		Hall of State
9:30 – 10:30	Building a Virtual Fiduciary Organization	Brian Lakkides, Ed Lynch	Kierland Ballroom 2
	Opportunities and Risks of Low Volatility Portfolios **[Master's Track]**	Robert Michaud, Michael Phillips, James Chong	Kierland Ballroom 4
	Prudent Benchmarking of Target Date Funds	Gregory Kasten	Kierland Ballroom 3
	Adding Participant Education to Your Advisory Practice	Trisha Brambley, Liz Davidson	Kierland Ballroom 1
10:45 – 11:45	*Tussey v. ABB:* or Lessons Learned When Ignoring the IPS at Your Own Peril	Duane Thompson, Al Otto, Scott Simon, Troy Doles	Kierland Ballroom 2
	Fees Have Been Disclosed, but are they Understood? **[Master's Track]**	Lee Topley	Kierland Ballroom 4
	Conflicts of Interest: Discovery, Mitigation and Disclosure	Johann Klaassen	Kierland Ballroom 1
	The Weakened Fiduciary Standard in 2013 in Regulatory Rulemaking and the Public Square: How we Got Here, What We can Do About It	Knut Rostad	Kierland Ballroom 3
11:45 – 12:45	Lunch		Trailblazer's Ballroom
12:15 – 12:45	fi360 Toolkit Lounge: Manage and report service providers fees and services as a value-add or for a 404(a)(5) or 408(b)(2) disclosure		Hall of State

TIME	EVENT	SPEAKER	LOCATION
12:45 – 1:45	Marketing the Fiduciary Standard to the Mass Market	Charles Goldman	Kierland Ballroom 2
	The Cows Have Left the Barn Again? One Fiduciary Practitioner's Perspective of Relevant ERISA Litigation – an Update **[Master's Track]**	Bert Carmody	Kierland Ballroom 4
	Plan Corrections Programs: Recognizing Client Problems and Finding Solutions	Robert Higgins	Kierland Ballroom 3
	Enhancing Fund Selection and Monitoring	Craig Watanabe	Kierland Ballroom 1
2:00 – 3:00	The Non-Fiduciary Position in Legal Filings **[Master's Track]**	Gregory Kasten	Kierland Ballroom 4
	Pitfalls, Traps, and Best of Practice Considerations in the 401(k) Front Lines	Alan Norris	Kierland Ballroom 1
	What the Human Body can Teach us About the Economy	Jeffrey Cleveland	Kierland Ballroom 3
3:00	Conference adjourns		