



Accredited Investment Fiduciary Analyst®

Program Agenda
Fi360 – Boston, MA
August 14-16, 2018

Day One

7:15 a.m. – 8:00 a.m. *Breakfast*

8:00 a.m. – 8:30 a.m. Welcome

- Course Objectives
- Designation marks and Company overview
- Instructor introduction and bios

8:30 a.m. – 10:15 a.m. Introduction

- The concept of a Global Fiduciary Standard of Excellence
- Legal issues and regulatory oversight review
- Global Fiduciary Precepts and Fiduciary Quality Management System
- International Organization for Standardization and fi360's ISO-like approach
- Assessments – their meaning and limitations

10:15 a.m. – 10:30 a.m. *Break*

10:30 a.m. – 12:00 p.m. Steward Case Study Exercise # 1: CAFE Part I

12:00 p.m. – 1:00 p.m. *Lunch*

1:00 p.m. – 1:30 p.m. Exercise # 1: Report Out

1:30 p.m. – 3:00 p.m. Exercise # 2: CAFE Part II

3:00 p.m. – 3:15 p.m. *Break*

3:15 p.m. – 5:00 p.m. Exercise # 2 continued



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Day Two

7:15 a.m. – 8:00 a.m. Breakfast

8:00 – 8:30 a.m. Exercise # 2: Report Out

8:30 – 10:15 a.m. Exercise # 3: CAFE Part III, OFIs/NCRs

10:15 – 10:30 a.m. Break

10:30 – 11:00 a.m. Exercise # 3: Report Out

11:00 – 12:00 p.m. Exercise # 4: Present Findings

12:00 – 1:00 p.m. Lunch

1:00 – 1:30 p.m. Exercise # 4 continued

1:30 – 2:00 p.m. Exercise # 4: Report Out

2:00 – 3:00 p.m. Exercise # 5: Schedules A & C

3:00 – 3:15 p.m. Break

3:15 – 4:30 p.m. Exercise # 5 continued

4:30 – 5:00 p.m. Quiz



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Day Three

<i>7:15 a.m. – 8:00 a.m.</i>	<i>Breakfast</i>
8:00 – 9:00 a.m.	CEFEX Assessments
9:00 – 10:15 a.m.	Advisor Case Study Exercise # 6: CAFE Parts I-III
<i>10:15 - 10:30 a.m.</i>	<i>Break</i>
10:30 – 12:00 p.m.	Exercise # 6 continued
<i>12:00 – 1:00 p.m.</i>	<i>Lunch</i>
1:00 – 1:30 p.m.	Exercise # 6: Report Out
1:30 – 2:30 p.m.	Exercise # 7: Schedule B
2:30 – 3:00 p.m.	Wrap-up and Review
<i>3:00 – 3:15 p.m.</i>	<i>Break</i>
3:15 – 4:45 p.m.	AIFA® Examination
