



AIF® Designation Training
Capstone Format
Classroom Session Agenda
Fi360 – Kansas City, MO – September 14, 2017

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|---------------------------------|-----------------------------------------|
| 8:00 – 9:30 a.m. | Introduction |
| <i>9:30 – 9:45 a.m.</i> | <i>Break</i> |
| 9:45 – 10:45 a.m. | Stewards and Advisors Step 1: Organize |
| 10:45 – 12:00 p.m. | Stewards and Advisors Step 2: Formalize |
| <i>12:00 – 1:00 p.m.</i> | <i>Lunch</i> |
| 1:00 – 2:00 p.m. | Stewards and Advisors Step 3: Implement |
| <i>2:00 – 2:15 p.m.</i> | <i>Break</i> |
| 2:15 – 3:15 p.m. | Stewards and Advisors Step 4: Monitor |
| 3:15 – 3:30 p.m. | Review and Wrap-Up |
| 3:30 – 5:00 p.m. | AIF® Designation Examination |