



**AIF® Designation Training
Capstone Format**
Classroom Session Agenda
Fi360 – Charlotte, NC – June 14, 2018

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| 7:30 a.m. – 8:00 a.m. | Breakfast |
| 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 and Advisors Step 1: Organize |
| 10:45 a.m. – 12:00 p.m. | Stewards and Advisors Step 2: Formalize |
| 12:00 p.m. – 1:00 p.m. | Lunch |
| 1:00 p.m. – 2:00 p.m. | Stewards and Advisors Step 3: Implement |
| 2:00 p.m. – 2:15 p.m. | Break |
| 2:15 p.m. – 3:15 p.m. | Stewards and Advisors Step 4: Monitor |
| 3:15 p.m. – 3:30 p.m. | Review and Wrap-Up |
| 3:30 p.m. – 5:00 p.m. | AIF® Designation Examination |