

ACCREDITED INVESTMENT FIDUCIARY (AIF)



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Introduction to Accredited Investment Fiduciary

Imagine becoming the gold standard in fiduciary responsibility, guiding clients with unwavering integrity and expertise. The Accredited Investment Fiduciary (AIF) course is designed to prepare investment professionals to act as fiduciaries, upholding the highest legal and ethical standards. This course covers the fundamentals of fiduciary responsibility, standards of conduct, and the process for implementing and monitoring prudent investment practices. It thoroughly prepares you for the AIF exam, a key requirement for obtaining the AIF designation from Fi360.



Why Choose Chools?

Numbers That Speak for Themselves:

- **10,000+ Successful Alumni:** Join a network of impactful professionals.
- **95% Job Placement Rate:** Secure your future with Chools' proven track record.
- **20+ Years of Excellence:** Trust in a legacy of education and industry expertise.
- **200+ Industry Partnerships:** Leverage our connections for real-world insights and opportunities.

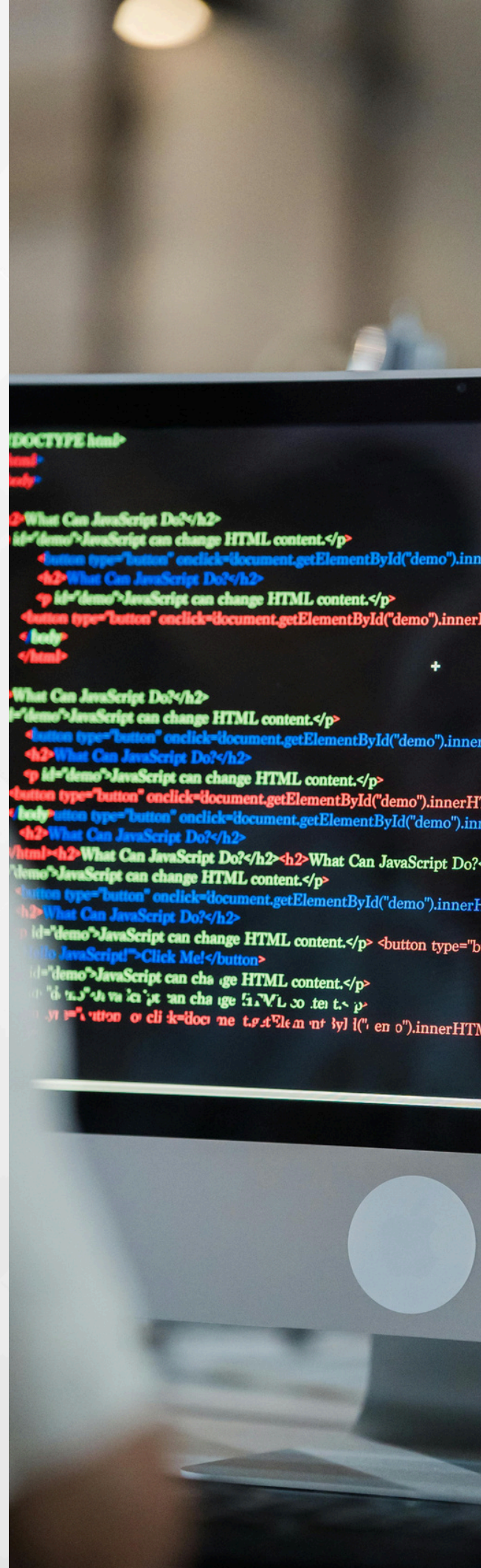
What Sets Us Apart?


- **Expert Instructors:** Learn from industry veterans with hands-on experience.
- **Hybrid Learning Model:** Balance online flexibility with in-person engagement.
- **Comprehensive Curriculum:** Stay ahead with courses designed meet market demands.
- **Community and Networking:** Be part of an active community of learners and professionals.

Who Can Apply?

Eligibility Criteria:

- Valid CPA license and current membership of the AICPA.
- At least three years of full-time or equivalent experience in personal financial planning or related fields.



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- Completion of at least 75 hours of financial planning education in the PFS Body of Knowledge categories within the five years before applying for the credential.
 - Passing a PFP-related exam, such as the PFS exam, the PFP Certificate exams, or the PFS Experienced CPA Assessment.

Program Overview

The AIF Program provides a comprehensive education in fiduciary responsibility and best practices. Our curriculum covers a wide range of topics to ensure a thorough understanding, combining theoretical knowledge with practical, hands-on experience.

Learning Mode:

- **Hybrid Learning Model:** Combines online learning with in-person sessions for flexibility and interactive engagement.
- **Interactive Sessions:** Includes live webinars, workshops, and Q&A forums with expert instructors and peers.
- **Self-paced Learning:** Access course materials anytime, allowing you to learn at your own pace.



PROGRAM OBJECTIVES

- Build knowledge and skills in fiduciary responsibility and standards of conduct.
- Understand the process for implementing and monitoring prudent investment practices.
- Prepare for the Accredited Investment Fiduciary (AIF) exam.
- Foster continuous learning and personal growth.
- Encourage teamwork and collaboration.
- Prepare for advanced roles in investment fiduciary services.

EXPECTED OUTCOMES

- Proficiency in fiduciary responsibility principles and best practices.
- Practical experience through hands-on exercises.
- Strong analytical and problem-solving skills.
- Application of best practices in fiduciary investment management.
- Innovation in understanding and managing fiduciary responsibilities.

SKILLS LEARNED

- **Fiduciary Responsibility:** Understanding and applying fiduciary responsibility principles.
- **Standards of Conduct:** Knowledge of standards of conduct for fiduciaries.
- **Prudent Investment Practices:** Techniques for implementing and monitoring prudent investment practices.
- **Professional Ethics:** Applying ethical standards and professional conduct in fiduciary services.
- **Strategic Thinking:** Developing and implementing strategic investment initiatives.
- **Decision-Making:** Making informed decisions based on fiduciary principles.
- **Communication Skills:** Enhancing communication and interpersonal skills in fiduciary services contexts.

Program Overview

Required Core Modules

Module 1: Introduction to Fiduciary Responsibility

- Basics of fiduciary responsibility and its importance.

Module 2: Standards of Conduct I

- Understanding standards of conduct for fiduciaries.

Module 3: Standards of Conduct II

- Advanced standards of conduct and professional ethics.

Module 4: Prudent Investment Practices I

- Techniques for implementing prudent investment practices.

Module 5: Prudent Investment Practices II

- Advanced monitoring and evaluation techniques for investment practices.

Module 6: Fiduciary Process I

- Understanding the fiduciary process and its implementation.

Module 7: Fiduciary Process II

- Advanced techniques for managing the fiduciary process.

Module 8: Ethics in Fiduciary Services I

- Applying ethical standards in fiduciary services.

Module 9: Ethics in Fiduciary Services II

- Advanced ethical standards and professional conduct.

Module 10: Scenario and Sensitivity Analysis I

- Basics of performing scenario and sensitivity analysis.

Module 11: Scenario and Sensitivity Analysis II

- Advanced scenario and sensitivity analysis techniques.

Module 12: Strategic Investment Management I

- Basics of strategic investment management.

Module 13: Strategic Investment Management II

- Advanced techniques in strategic investment management.

Module 14: Communication in Fiduciary Services I

- Basics of enhancing communication and interpersonal skills in fiduciary services.



Program Overview

Module 15: Communication in Fiduciary Services II

- Advanced communication techniques in fiduciary services.

Module 16: Case Studies and Practical Applications

- Real-world case studies and practical applications in fiduciary investment management.

Enrollment Now Open!

Take the first step towards mastering fiduciary responsibility and earning your AIF credential. Enroll in our **Accredited Investment Fiduciary (AIF)** Program and enhance your career with Chools.