



CEFEX General Meeting
Wednesday, April 25, 2018
Hilton, San Diego Bayfront – Room 502
Agenda

This is a forum for the exchange of ideas on how to leverage the CEFEX certification program. We welcome participation from CEFEX analysts and CEFEX-certified firm representatives.

C.E. Credit: This meeting qualifies for 3 hours of continuing education credit for the AIF® and AIFA® designations.

7:30 AM	Breakfast and Registration	
8:30 AM	Welcome & Introduction	Carlos Panksep, Managing Director, CEFEX
8:45 AM	Building our Community Expert commentary on new Fiduciary Practices, Impartial Conduct Standards, reputation and digital advice.	Blaine Aikin, Executive Chairman, Fi360 and CEFEX
9:35 AM	CEFEX Program update Public Relations, Steward Certifications, ASPPA Program	Carlos Panksep and team
10:05 AM	Certification Marketing Update New CEFEX materials. How to communicate excellence.	Rebecca Hourihan, Principal 401(k) Marketing
10:30 AM	Networking Break	
11:00 AM	Integrating Six Advisor Tools for Uber-Efficiency	Rob Coopman, CEFEX Analyst and Ed Chairvolotti, Chairvolotti Financial
11:45 AM	Dimensional’s Next Generation Default Investing Update	Tim Kohn, Vice President, Head of Defined Contribution, Dimensional Fund Advisors
12:00 PM	Legal and Regulatory Update Mr. Winters will provide a regulatory update	Brigen Winters, Principal Groom Law Group

	and an update on plan sponsor fee litigation cases.	
12:45 PM	Meeting Close	Carlos Panksep
12:50 PM	Lunch sponsored by Dimensional Fund Advisors	
3:00 PM	Fi360 Conference starts	

Notes:

- 1.** This session is mandatory for CEFEX Analysts.
- 2.** Fee (\$300) is waived for active Analysts (e.g. more than 3 CEFEX certification assessments in past year)
- 3.** The fee is waived for the first representative of each CEFEX-certified firm.
- 4.** The session will be recorded and made available to those who cannot attend in person (same fee applies)