



## RF™ Self Study for Wealth Management and IRAs Supporting Professionals Committed to a Superior Standard of Care

### GOALS OF THE COURSE

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- Enable professionals to operate at a superior standard of care
- Make a compelling case for choosing professionals with an RF™
- Comply with present and future regulations
- Maintain a profitable business with rising revenue
- Maximize the market value of the professional practice

### WHO SHOULD TAKE THE COURSE

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- Advisors whose primary business is providing investment advice and/or investment management services to wealthy individuals.

### BENEFITS OF TAKING THE COURSE

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- Differentiate the practice from less qualified professionals
- Increase capacity to add new business
- Qualify to become a Registered Fiduciary (RF™)
- DALBAR certification of Wealth Management and IRA knowledge

### COURSE CONTENT

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- Module 1: Overview of RF™
- Module 2: The Certain Uncertainty
- Module 3: Fiduciary Risks & Liabilities
- Module 4: Tax Advantaged Arrangements
- Module 5: Fiduciary Practice Management
- Module 6: Profit-Based Pricing



- Module 7: Overseeing a Fiduciary Practice

#### **TIME REQUIRED FOR THE COURSE**

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- 3 – 5 hours for advisors who are experienced wealth managers
- Certification requires a proctored exam that takes 30 minutes

#### **PRICING**

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- Individual rate: \$350
- Group rates:
  - 10 candidates: \$2,500
  - 100 candidates: \$20,000
- Unlimited use for 12 months: \$100,000 (includes private label packaging for use on service provider Website)
- Customization and integration with a firm's offerings are done at cost