



SECURITIES INDUSTRY INSTITUTE

**SII2019**  
EXCELLENCE IN LEADERSHIP DEVELOPMENT

Start Time	End Time	Session Name	CFP® Credits	CIMA®, CPWA®, CIMC®, and RMA <sup>SM</sup> Credits	CLE Credits
3/4/19 10:35 AM	3/4/19 12:05 PM	Ethics Y3 - Ethics and Decision Making: The Problem of Hard Questions		1.5 Ethics	
3/4/19 10:35 AM	3/4/19 12:05 PM	Linking Finance and Strategy		1.5	
3/4/19 1:30 PM	3/4/19 3:00 PM	Blue Ocean Strategy		1.5	
3/4/19 1:30 PM	3/4/19 3:00 PM	Choice Architecture		1.5	
3/4/19 1:30 PM	3/4/19 3:00 PM	Communication Style		1.5	
3/4/19 1:30 PM	3/4/19 3:00 PM	Connected Strategies		1.5	
3/4/19 1:30 PM	3/4/19 3:00 PM	Consumer Perspective to Portfolio Construction	1.5	1.5	
3/4/19 1:30 PM	3/4/19 3:00 PM	ESG and Impacting Investing in Today's Markets	1.5	1.5	
3/4/19 1:30 PM	3/4/19 3:00 PM	Healthcare Spending	1.5		
3/4/19 1:30 PM	3/4/19 3:00 PM	The Financial Crisis of 2008: What Have We Learned Ten Years After?	1.5	1.5	
3/4/19 1:30 PM	3/4/19 3:00 PM	Whealthcare		1.5	
3/4/19 3:20 PM	3/4/19 4:50 PM	Blue Ocean Strategy		1.5	
3/4/19 3:20 PM	3/4/19 4:50 PM	Collaboration Skills Development		1.5	
3/4/19 3:20 PM	3/4/19 4:50 PM	Connected Strategies		1.5	
3/4/19 3:20 PM	3/4/19 4:50 PM	Ethics Y1 - What does it Mean to be Ethical?		1.5 Ethics	
3/4/19 3:20 PM	3/4/19 4:50 PM	Global Economy in the Era of Trump	1.5	1.5	
3/4/19 3:20 PM	3/4/19 4:50 PM	Macroeconomic/Global Climate	1.5	1.5	
3/4/19 3:20 PM	3/4/19 4:50 PM	Non-Monetary Incentives		1.5	
3/4/19 3:20 PM	3/4/19 4:50 PM	Playing to Your Strengths		1.5	
3/5/19 8:45 AM	3/5/19 10:15 AM	Economic, Financial, and Demographic Trends Impacting Global Investing	1.5	1.5	
3/5/19 8:45 AM	3/5/19 12:05 PM	History of Business	150 mins	160 mins	



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3/5/19 8:45 AM	3/5/19 12:05 PM	Scenario Planning		160 mins	
3/5/19 1:30 PM	3/5/19 3:00 PM	Cyber Crimes		1.5	
3/5/19 1:30 PM	3/5/19 3:00 PM	Cyber Security		1.5	
3/5/19 1:30 PM	3/5/19 3:00 PM	Ethics Y2 - The Role of Culture		1.5 Ethics	
3/5/19 3:20 PM	3/5/19 4:50 PM	Financial Analysis and Interpretation		1.5	
3/5/19 3:20 PM	3/5/19 4:50 PM	Return of Stocks and Bonds (Advanced)	1.5	1.5	
3/6/19 8:45 AM	3/6/19 10:15 AM	Blue Ocean Strategy		1.5	
3/6/19 8:45 AM	3/6/19 10:15 AM	Enhancing Your Influence		1.5	
3/6/19 8:45 AM	3/6/19 10:15 AM	Global Economy in the Era of Trump	1.5	1.5	
3/6/19 8:45 AM	3/6/19 10:15 AM	Improving Decision Making		1.5	
3/6/19 8:45 AM	3/6/19 10:15 AM	Individual Thinking Styles		1.5	
3/6/19 8:45 AM	3/6/19 10:15 AM	Positive Interactions at Work - Moving from Communication to Connection		1.5	
3/6/19 8:45 AM	3/6/19 10:15 AM	Strategic Agility		1.5	
3/6/19 10:35 AM	3/6/19 12:05 PM	Central Banking in a Global Context	1.5	1.5	
3/6/19 10:35 AM	3/6/19 12:05 PM	China	1.5	1.5	
3/6/19 10:35 AM	3/6/19 12:05 PM	Emerging Markets	1.5	1.5	
3/6/19 10:35 AM	3/6/19 12:05 PM	Emerging Regulatory Issues	1.5	1.5	
3/6/19 10:35 AM	3/6/19 12:05 PM	ETF Due Diligence	1.5		
3/6/19 10:35 AM	3/6/19 12:05 PM	Factor Based Investing	1.5	1.5	
3/6/19 10:35 AM	3/6/19 12:05 PM	Foreign Exchange Markets	1.5	1.5	
3/6/19 10:35 AM	3/6/19 12:05 PM	Fundamentals of Securities Operations	1.5	1.5	
3/6/19 10:35 AM	3/6/19 12:05 PM	Generating Cash Flow for Retirement: Caviar or Cat Food	1.5	1.5	
3/6/19 10:35 AM	3/6/19 12:05 PM	Market Structure	1.5	1.5	



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3/6/19 10:35 AM	3/6/19 12:05 PM	Mock Securities Arbitration		1.5	1.5
3/6/19 10:35 AM	3/6/19 12:05 PM	Private Equity	1.5	1.5	
3/6/19 10:35 AM	3/6/19 12:05 PM	Regulatory Jeopardy	1.5		
3/6/19 10:35 AM	3/6/19 12:05 PM	Risk Management - Journey or Destination?	1.5	1.5	
3/6/19 10:35 AM	3/6/19 12:05 PM	Taxes and Investing	1.5	1.5	
3/6/19 10:35 AM	3/6/19 12:05 PM	The FED and the Impact of the Job Market and Inflation on Monetary Policy	1.5	1.5	
3/6/19 10:35 AM	3/6/19 12:05 PM	What Is The Fiduciary Standard Of Care?	1.5	1.5	
3/6/19 10:35 AM	3/6/19 12:05 PM	Why Social Security Matters	1.5	1.5	
3/6/19 1:30 PM	3/6/19 3:00 PM	Blue Ocean Strategy		1.5	
3/6/19 1:30 PM	3/6/19 3:00 PM	Business and Public Policy: Taxes, trade, interest rates, and all that	1.5	1.5	
3/6/19 1:30 PM	3/6/19 3:00 PM	Diversification or De-worse-ification	1.5	1.5	
3/6/19 1:30 PM	3/6/19 3:00 PM	Enhancing Your Influence		1.5	
3/6/19 1:30 PM	3/6/19 3:00 PM	Future of Business		1.5	
3/6/19 1:30 PM	3/6/19 3:00 PM	Improving Decision Making		1.5	
3/6/19 1:30 PM	3/6/19 3:00 PM	Individual Thinking Styles		1.5	
3/6/19 1:30 PM	3/6/19 3:00 PM	Innovation Strategy		1.5	
3/6/19 1:30 PM	3/6/19 3:00 PM	Positive Interactions at Work - Moving from Communication to Connection		1.5	
3/6/19 1:30 PM	3/6/19 3:00 PM	Strategic Agility		1.5	
3/6/19 1:30 PM	3/6/19 3:00 PM	Understanding Customer Behavior		1.5	
3/6/19 1:30 PM	3/6/19 3:00 PM	Womenomics	1.5	1.5	
3/6/19 3:20 PM	3/6/19 4:50 PM	Collaboration Skills Development		1.5	



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3/6/19 3:20 PM	3/6/19 4:50 PM	Communication Style		1.5	
3/6/19 3:20 PM	3/6/19 4:50 PM	Global Capital Markets	1.5	1.5	
3/6/19 3:20 PM	3/6/19 4:50 PM	History and Future of Money	1.5	1.5	
3/6/19 3:20 PM	3/6/19 4:50 PM	Individual Thinking Styles		1.5	
3/6/19 3:20 PM	3/6/19 4:50 PM	Making Ideas Stick		1.5	
3/7/19 8:45 AM	3/7/19 10:15 AM	Fundamentals of Market Returns	1.5	1.5	
3/7/19 10:35 AM	3/7/19 12:05 PM	Artificial Intelligence		1.5	
3/7/19 10:35 AM	3/7/19 12:05 PM	Big Data/Big Responsibilities		1.5 Ethics	
3/7/19 10:35 AM	3/7/19 12:05 PM	Information Security		1.5	
3/7/19 10:35 AM	3/7/19 12:05 PM	Making Sense of Blockchain: Charting a Strategic Path Forward		1.5	
3/7/19 10:35 AM	3/7/19 12:05 PM	The Evolving Cyber Threat Landscape		1.5	
3/7/19 1:30 PM	3/7/19 3:00 PM	Discussion with Jeremy Siegel	1.5	1.5	
3/7/19 1:30 PM	3/7/19 3:00 PM	The Financial Crisis of 2008: What Have We Learned Ten Years After?	1.5	1.5	
3/7/19 3:20 PM	3/7/19 4:50 PM	The Misunderstood Millennial		1.5	
3/8/19 8:45 AM	3/8/19 10:00 AM	The Washington Update	1	1.5	