

Fiduciary Essentials™

Fiduciary Essentials is specially designed for Trustees, Lawyers, Accountants, Boards and Investment Committees.

This training programme is also used across the Pacific by a broad range of investment entities that a fiduciary may serve on, from Charitable Trusts to Sovereign Funds.

Fi360 Pacific



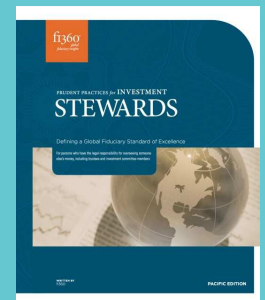
Global Fiduciary Insights

Fiduciaries can come from diverse backgrounds, and our goal is to offer you practical guidance on how to implement an investment governance framework.

The course has as its basis a defined global fiduciary standard, it covers seven core precepts every fiduciary should know and follow.

The programme overview for this one-day training includes:

- Your approach to Standards, Laws and Trust Provisions.
- Addressing the Fiduciary Duty to Diversify.
- Components of an effective Investment Policy Statement.
- Hiring Prudent Experts (providers) and documenting required Due Diligence.
- Controlling and accounting for all investment fees and costs.
- Monitoring the activities of the Prudent Experts (providers).
- Avoiding Conflicts of Interest (internally, between providers and between your entity and providers).



The course includes team exercises and practical scenarios. Our aim is to provide hands-on training so you can apply the fiduciary precepts.



Fiduciary Essentials™ Customised to Your Training Needs

We can also work with you or your organisation to adapt our training to best suit your needs. The course can be made longer to cover in more detail topics such as:

- Questions a committee should ask when considering any investment opportunity.
- Understanding performance reporting and common shortfalls.
- Responsible Investment and integrating ESG into investments.
- Fundamentals of Portfolio Design and provider approaches.

Our team of instructors have considerable expertise across investment governance, responsible investing, institutional asset management, advice, investment due diligence, and direct investing.

Contact Us

The standard pricing for our full-day FE™ Program is \$950 plus GST per person (NZD or AUD). This includes catering, Prudent Practices handbook and course materials.

Standard Full-day FE™ in-house programme is \$4,500 plus GST.
Clients provide venue and catering.

Half-day FE™ in-house programme is \$3,000 plus GST.
This option covers the seven precepts but does not include practical scenarios.

If you would like to attend our next FE™ programme or have any queries, please contact our Training Co-ordinator, Lisa Martell:

Email: lisa.martell@fi360.co.nz

Fi360 Pacific helping you grow and protect the assets under your care

