

# Accredited Investment Fiduciary<sup>®</sup> Designation Training

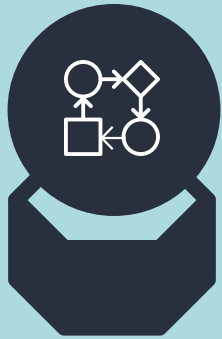
Learn the higher standard of investment process being adopted globally by boards, investment committees, professionals and advisers.

Raise your competency in your fiduciary role and add genuine value to investment decisions.

Distinguish your service offering and be ahead of the increasing regulatory bar.

Meet the needs of clients seeking more trustworthy services.

The course provides a comprehensive education on fiduciary standards of care, including the legal and regulatory requirements for managing investment decisions on behalf of others. Practical aspects of applying a prudent investment process are covered from start to finish.



## Investment Governance

This course provides specialist training in fiduciary standards and can help you differentiate yourself as an investment governance professional. Organisations can use the standards taught to review and improve internal processes.

## Global Fiduciary Insights

In the context of different regulatory frameworks across the Pacific, our training teaches a defined global fiduciary standard. This will help you stay abreast of a higher standard of client care than what is required for compliance purposes.



## This Program is Likely to Benefit a Range of Investment Professionals:

- Investment Advisers & Consultants
- Trustees & Directors
- Investment Committee Members
- Fund Administrators & Managers
- Market Regulators
- Accountants & Lawyers serving in fiduciary roles



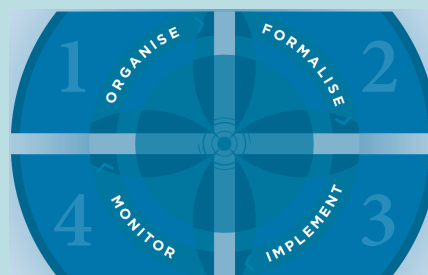
# Course Overview

The Accredited Investment Fiduciary Program<sup>®</sup> is a two-day course, which concludes with an examination to earn the AIF<sup>®</sup> Designation. AIF<sup>®</sup> Designees can access a wealth of online continuing education materials through Fi360 Pacific.

The course covers practices and criteria organised under a four-step fiduciary quality management system.

## Introduction to the fundamentals of fiduciary responsibility

- The concept of a Fiduciary Standard.
- Legal issues and regulatory oversight.
- Global Fiduciary Precepts and Fiduciary Quality Management System (FQMS).
- International Organisation for Standardisation and our ISO-like approach.
- Assessments – their meaning and limitations.



### Step 1 - Organise fiduciary duties and responsibilities

- Essential components of a fiduciary file.
- Roles and responsibilities.
- Types of fiduciaries and characteristics of a successful fiduciary.
- Managing conflicts of interest.

### Step 2 - Formalise an investment strategy

- Fundamentals of portfolio design.
- The need for and elements of an Investment Policy Statement.
- Socially Responsible Investing.

### Step 3 - Implement the investment strategy and conduct due diligence

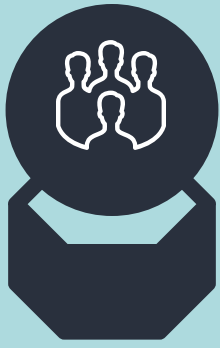
- Service providers selection.
- Due diligence philosophy.
- Due diligence of products and providers.

### Step 4 - Monitor Investment results, fees and providers

- Elements of monitoring, including quantitative and qualitative reviews and costs.
- The meaning and principles of Assessment.
- Assessment types, activities and phases.

The course also has an interactive component where there are team exercises with practical scenarios.





## Our Team

Our training team has considerable expertise across investment governance, institutional asset management, advice, investment due diligence, and direct investing.

## Contact Us

The standard pricing for our AIF® Program, which includes the final exam and first year designee membership fee is \$1,900 + GST (NZD or AUD).

Discounts are available for early registrations and groups, or in-house training.

Please contact Lisa Martell if you would like to attend our next AIF® or have any queries.

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# Fi360 Pacific

Helping you grow and protect the assets under your care

