The Excellent Fiduciary™

Preparing executives and managers for the stewardship role

Training Category: *Retirement Plans*

Extended course outline

Course title: The Excellent Fiduciary™

COURSE #PP-1212

EXTENDED COURSE OUTLINE

Training your retirement plan's team can improve outcomes for every stakeholder including your employees, their beneficiaries, and your organization.

After taking training our clients have realized a major gain in the performance of their retirement plans because they are able to translate the concepts of fiduciary duty into actions in these major areas.

- *All four of ERISA's required fiduciary disciplines*
- *The impact of vendors' costs on retirement plan outcomes*
- *Solutions for ERISA personal and business risk management*

Benefits of Attending

Participants in this training course will examine a set of standardized steps for fiduciaries that were developed by an industry task force. Guidelines on how to adopt them in actual practice will be presented. This course offers the following benefits:

- *Sets a solid foundation for doing the right things the right way*
- *Clarifies ERISA's murky rules on fiduciary duty*
- *Introduces a measuring stick to track ongoing improvements in a retirement plan's management*
- *Develops awareness of the most sensitive fiduciary issues and how to handle them*
- *Enables a better understanding of what to expect from third party providers' programs.*

What You Will Learn

- *Covers all ERISA plans including 401(k), 403(b), and DB plans*
- *The fundamentals of fiduciary duty under ERISA*
- *Common gaps in plan sponsors' management systems*
- *How to avoid a DOL fine*
- *ERISA's "prudent process" rule and how to know if you qualify under it.*

Who Should Attend

- *Members of boards of directors*
- *Chief financial officers*
- *Members of employee benefits and investment committees*
- *Human resource executives and managers*
- *Anyone who performs fiduciary related activities for an organization's ERISA qualified plan.*

Registration Fees - This course is available online to individuals for $375, which is payable at the time of registration. (Special rates are available at the online registration page for more than two people from the same organization.) The course is conveniently self-paced, which means that it can be viewed, stopped, and restarted at your convenience. The online course's duration is approximately 2 hours. Remember, this fee is tax-deductible (see Treas. Reg. 1 162-5). **Please note:** Registration fees are subject to change without notice. Register at www.rolandcriss.com/Register-For-Training.

Transfer, Cancellation, and Refund Policy - This course is offered to individuals online and to groups at your location. You may cancel without penalty at any time up to three weeks prior to an on location seminar. If Roland|Criss receives less than three weeks' notice, or if the seminar date is cancelled by your organization, it will be liable for the entire seminar fee. Registration for the online version of this course is nonrefundable. We appreciate that this is an important investment for you and your company and would like to accommodate your needs the best we can. Please call us and tell us how we may help you**.**

Contact – Questions? Please ask for Kristi Arthur by e-mail at karthur@rolandcriss.com or by telephone at 800-440-3457.

IFLC *This course is approved by the Investment Fiduciary Leadership Council, Inc.*