

Investment Fiduciary Masterclass

A one-day course designed for Investment Stewards in governance or management roles who have completed the AIF[®], FE or IGE Training Courses, focusing on the practical implementation of best practice investment governance standards.

The workshops teach in-depth practical application of the four steps of the Fiduciary Quality Management System.



Each workshop will review core fiduciary precepts and specific practices, then progressively introduce practical content, requiring attendee group interaction. Attendees should be prepared to undertake pre-reading, and to actively contribute to the workshop environment. There is no examination.

Learning Outcomes

Assess: Learn ways to undertake, and present, Level One Self-Assessments (SAFE) to identify opportunities for improvement.

Prioritize: Learn how to create and maintain annual task priorities and to short list topics in order to build governance capability.

Fiduciary File: Learn to develop and to maintain a practical fiduciary file.

Fiduciary Calendar: Understanding which issues and topics should be included in an annual plan of activities

Our Investment Fiduciary Masterclass has been designed for you



Ensuring your investment strategy is well designed and implemented is one of the most powerful actions you can take to protect the wellbeing and prosperity of your organization and people in the future



APAFS has partnered with Fi360Pacific to bring you this course. Our team of instructors are experts in their fields and have considerable experience in investment governance

Benefits

This course can help you:

- Improve board dynamics
- Increase fiduciary standard of care
- Better documentation of processes
- Better service provider interaction
- Demonstrate trustworthiness

Contact

admin@apafs.org
+1671688-2507