FEDC Fiduciary Essentials for DC Plans

What is FEDC?

- Fiduciary Essentials for Defined Contribution Plans course is a training course for retirement plan fiduciaries and others involved in the oversight process, on how they can improve their fiduciary responsibilities. The course covers the scope of their responsibilities and what they need to do to fulfill those duties to the standard of care required by law.

Course Learning Objectives

- Identify the function of a plan steward and the importance of managing responsibility
- Illustrate the seven fiduciary precepts and the obligation of a plan steward
- Apply the fiduciary precepts to a simple investment decision making process

Training Format

- Instructor-Led Classroom - have an fi360 instructor present the training in a half-day session

Course Outline

- Session 1: The Role of a Retirement Plan Steward
- Session 2: Seven Fiduciary Precepts Every Steward Must Know
- Session 3: Applying the Fiduciary Precepts

Participants will earn a Certificate of Completion by passing the final examination with a score of 70% or higher.

CE Eligible

- Classroom programs are eligible for CE credits with National Association of State Boards of Accountancy (NASBA); with the Society for Human Resource Management (SHRM); and, the HR Certification Institute (HRCI).

fi360® fiduciary essentials for DC Plans