

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



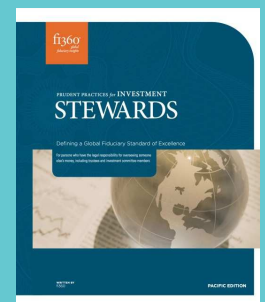
Global Fiduciary Insights

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.



www.apafs.org



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



Contact Us

If you would like to attend our next FE™ course or have any queries, please get in touch:

✉ admin@apafs.org

Pacific Region Investment Conference

This conference is held annually in the Philippines. It provides a well rounded programme offering ideas for dealing with difficult situations, innovative approaches for seemingly impossible dilemmas and a strong grounding for meeting your fiduciary obligations.

To register or more information visit our site www.apafs.org



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



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