



Fiduciary Essentials® (FE®) Training

Manila, Philippines

18 November, 2019

Program Agenda

7:30 – 8:00 a.m.	Registration and Breakfast
8:00 – 8.30 a.m.	Introduction to the History and Significance of the Fiduciary Standard
8.30 – 9.00 a.m.	Laws and Governing Documents for Fiduciaries
9.00 – 10.00 a.m.	The Fiduciary Duty to Diversify
<i>10.00 - 10.15am</i>	<i>Break</i>
10.15 – 10:45 a.m.	Crafting an Effective Investment Policy Statement
10:45 –11:30 a.m.	Performing Effective Due Diligence
11.30 – 12.15 p.m.	Controlling and Accounting for Investment Costs
<i>12:15 – 1:00 p.m.</i>	<i>Lunch</i>
1:00 – 2.00 p.m.	The Fiduciary Duty to Monitor
2.00 – 2.45 p.m.	Dealing with Conflicts of Interest
<i>2:45 – 3:00 p.m.</i>	<i>Break</i>
3:00 – 5:00 p.m.	Practical Scenarios and Wrap Up
