

Investment Steward Essentials



Do you serve in an investment stewardship role as a trustee, director or investment staff?

Our Investment Steward Essentials course has been designed for you.

Our two-day **Investment Steward Essentials** training seeks to define what systems and processes stewards should have in place to meet their fiduciary obligations.

It involves working to a defined fiduciary standard, and being able to demonstrate that this is consistently and effectively applied.



The course focuses on 3 areas:



Stewardship
Stay in Governance and build capacity to do so.



Relevant Investment Policy
Develop and document your investment framework.



Advice Relationships
Ensure an alignment with your values.

The two-day **Investment Steward Essentials** Training Course is tailored towards individuals serving in investment stewardship roles, including trustees, directors, and investment staff.

The course will cover:

- the broad range of investment options available to the investment steward;
- the main parties involved in managing the investment funds of an organization; and
- the global best-practice investment governance framework developed by Broadridge (Fi360).

The course consists of a series of learning modules and interactive scenarios designed to represent commonly encountered issues an investment steward will face.

Attendees will be provided with electronic copies of the course and supporting materials. Course attendance also qualifies for CE hours for AIF® holders.

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