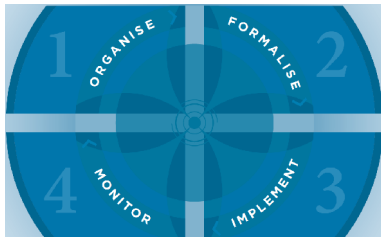


Investment Steward Masterclass

A one-day course designed for Investment Stewards in governance or management roles, builds upon our new Investment Steward Essentials Training Course as well as the existing AIF® and IGE Training Courses, focusing on the practical implementation of best practice investment governance standards.

Each Masterclass will focus upon one of the four steps in the global best practice standard for Investment Stewards developed by Broadridge (Fi360).



For the **2026 Fiduciary Week**, the focus will be on the **Organize** step and how to build effective, high-trust relationships between a Board, management, and external advice. The course will mainly comprise 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.

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 Steward 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

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