



Fiduciary Essentials® Training
New World Hotel, Makati
Monday, November 14, 2022

Program Agenda

7:30 – 8:00 a.m.	Registration and Continental 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 – 10:15 a.m.</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
