



## 2025 Fiduciary Training Series, Part 1: Best Practices for Plan Sponsors (Webinar Recording)

A *fiduciary* is a person or organization who prudently takes care of money or assets for another person or organization. Under the Employee Retirement Income Security Act of 1974, also known as ERISA, retirement plan sponsors are fiduciaries of their retirement plans. This means they are legally bound to act solely in the best interest of their plan participants. Fiduciaries who fail to fulfill that duty can face penalties and personal liability for plan losses.

Topics covered include:

- How you can identify plan fiduciaries;
- Four critical fiduciary responsibilities;
- The potential consequences of a fiduciary failure;
- Fiduciary liability reduction strategies and tactics; and
- How to differentiate between the two Department of Labor (DOL) fiduciary correction programs.

### **Additional CAPTRUST Resources:**

[Fiduciary Best Practices for Plan Sponsors Slide Deck](#)

[The Importance of Fiduciary Training](#)

For a copy of the transcript, [click here](#).

Our 2024 series:

- [2024 Fiduciary Training Series, Part 1: Roles and Responsibilities](#)
- [2024 Fiduciary Training Series, Part 2: Plan Governance](#)



- [2024 Fiduciary Training Series, Part 3: Fiduciary Risk Management](#)
  - [2024 Fiduciary Training, Part 4: Avoiding Scams](#)
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