



2025 Fiduciary Training Series, Part 2: Effective Plan Governance (Webinar Recording)

One often-overlooked aspect of qualified retirement plan operations is the need for a prudent and comprehensive governance process. Plan rules and procedures are often contained in a series of governing plan documents and service agreements. Plan officials are faced with analyzing and interpreting numerous documents from multiple entities. By creating a governance process, plan officials can help ensure plan operations are consistent and adhere to fiduciary standards.

Jenny Kiffmeyer, JD, and COO of Retirement Learning Center covers several topics, including:

- Understanding the importance of a plan governance process;
- Assisting plan sponsors and committees in becoming better consumers of fiduciary services;
- Identifying and addressing actual and potential conflicts of interest;
- Avoiding the legal implications of inconsistent plan-related documents, service agreements and contracts; and
- Assessing educational needs of committees and plan officials.

Additional CAPTRUST Resources:

- [On Beyond Fiduciary: Effective Plan Governance Slide Deck](#)
- [2025 Fiduciary Training, Part 1: Best Practices for Plan Sponsors](#)
- [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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