CAPTRUST

2023 Fiduciary Training Series, Part 3: Retirement Plan Investment Menus (Webinar Recording)

Making investment decisions for an organization’s retirement plan can prove challenging. Plan sponsors must consider how to maintain a competitive benefit offering while facing complex fiduciary requirements and increasing litigation in the retirement plan space.

The next installment of our Fiduciary Training webinar series focuses on fiduciary responsibilities related to retirement plan investment menus. Specifically, we discuss investment menu construction, investment policy statements, and investment-related fees, as well as maintaining or delegating fiduciary responsibility for investment-related decisions.

Director of Retirement Plan Consulting Dawn McPherson moderates a panel of three additional subject matter experts. They are CAPTRUST Financial Advisor Catherine Ellis, CAPTRUST Investment Strategist Kevin Fieldman, and Joshua Sutin, ERISA counsel at Chamberlain Hrdlicka.

To download a copy of the transcript, click here.

Additional Resource

Fiduciary Training Part III: Retirement Plan Investment Menus slide deck