



2024 Fiduciary Training Series, Part 2: Plan Governance (Webinar Recording)

It can be daunting to navigate the evolving landscape of retirement plan oversight, especially with the recent increase in regulatory requirements. However, ensuring compliance is crucial. Creating and maintaining a sound governance process will allow for effective and efficient plan oversight.

In this webinar recording, we delve into the essentials of retirement plan governance. We discuss how effective governance streamlines decision-making, reduces risk, increases the likelihood of meeting plan objectives, and improves controls.

Topics include:

- overall plan governance;
- documenting processes and procedures to ensure you're meeting your fiduciary obligations;
- appropriately delegating duties and responsibilities;
- managing and developing an investment policy; and
- selecting and monitoring service providers.

Additional Resources

[Webinar Presentation Deck](#)

[The Importance of Fiduciary Training](#)

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

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