



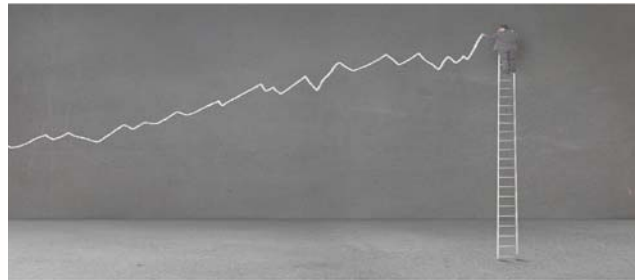
FEDC

Fiduciary Essentials for DC Plans

Have you been searching for ways to connect with plan sponsors? Are you looking to stand out from the crowd? With increasing regulatory pressure on fiduciary responsibility, Fiduciary Essentials for Defined Contribution Plans (FEDC) is an ideal and easy way to foster relationships with investment stewards while adding significant value to your services.

Many plan sponsors, stewards, committee members, and administrators are unaware of their fiduciary duties and responsibilities. These plan fiduciaries turn to FEDC to learn how they can improve their fiduciary decision-making process while minimizing liability.

Add Value.
Build Trust.
Stand Out.



Benefits to You:

- **Differentiate** yourself and win new business by providing a unique value add to your services
- **Establish** stronger and more trusted relationships with plan fiduciaries
- **Reduce** risk through improved fiduciary awareness
- **Retain** current business and fight fee compression by adding value
- **Promote** your commitment to industry standards and best practices

Stats You Should Know:

- **72%** of plan sponsors feel that reviewing fiduciary responsibilities is an important service to receive from their provider¹
- **45%** of plan sponsors are not comfortable that all relevant individuals in their organization are aware of their fiduciary status¹
- **37%** of plan sponsors, committee members, and administrators stated they do not consider themselves plan fiduciaries¹

¹Inside the Minds of Plan Sponsors Survey Report, Society for Human Resource Management



Course Details

Fiduciary Essentials for DC Plans

What is FEDC?

- Fiduciary Essentials for Defined Contribution Plans course is a training course for retirement plan fiduciaries and others involved in the investment process on how they can improve their fiduciary decision-making. The course covers the scope of their responsibilities and what they need to do to fulfill those duties to the standard of care required by law.

Course Learning Objectives

- Identify the function of a plan steward and importance of managing responsibility
- Illustrate the seven fiduciary precepts and the obligation of a plan steward
- Apply the fiduciary precepts to a simple investment decision making process

Training Options

- Self-Paced Online—go at your own pace and complete within 90 days
- Instructor-Led Classroom—have an fi360 instructor present the training in a half day session

Course Outline

- Session 1: The Role of a Retirement Plan Steward
- Session 2: Seven Fiduciary Precepts Every Steward Must Know
- Session 3: Applying the Fiduciary Precepts

Participants will earn a Certificate of Completion by passing the final examination with a score of 70% or higher.

CE Eligible

- Online FEDC program is eligible for CE credits with the Society for Human Resource Management (SHRM) and the HR Certification Institute (HRCI)
- Classroom programs are eligible for CE credits with National Association of State Boards of Accountancy (NASBA) and is pending for SHRM and HRCI

