STILES FINANCIAL SERVICES
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Proudly Presents

Fiduciary Fitness Served Over Easy

A virtual series to help "beef up" your fiduciary knowledge!

Do you provide oversight for your company retirement plan in a roll such as Committee member, benefits director, HR manager, CFO or owner of the business? If so, you are expected to engage in ongoing fiduciary training and education.

We've created "Fiduciary Fitness Served Over Easy" to hone your knowledge and help mitigate your risk around the oversight of your company's plan.

Please join us for our three-part workshop built to enhance your retirement plan oversight.

8:30-10 a.m.

Since we can't treat you to breakfast, participate in one, two or all three sessions and look for a special treat in the mail!

RSVP to kaylin@stilesfinancial.com with your name and mailing address to receive the login information.

Understanding ERISA:
Key Provisions for Plan Sponsors

Tuesday, January 19, 2021

Covered Topics:

- What is ERISA?
- Who is a fiduciary? What does that mean?
- What is a 3(16), 3(21) and 3(38)?
- Plan design and administrative consideration
- Impact on plan investments
- Service providers and their roles
- Reporting and participant education
- Subsequent legislation

Best Practices for Your Investment Committee

Tuesday, February 16, 2021

Covered Topics:

- Why do you need a committee?
- Who should be on your committee? How often should you meet?
- Documenting fiduciary duties, decisions and implementation
- Required oversight of providers and fees
- Staying up-to-date

Investment Policy Statement Best Practices:
Development and Ongoing Use

Tuesday, March 16, 2021

Covered Topics:

- Why should I have one?
- What should it cover and how detailed should it be (or not be)?
- Use in ongoing monitoring and decision-making
- Committee duties vs. advisor duties
- When to amend

RSVP Now!

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