

Staying Ahead: Fiduciary Best Practices and Legislative Insights for Institutional Plans

Fiduciary duty plays a foundational role in ensuring that institutional retirement plans are managed with the utmost care, integrity, and diligence. In this session, we'll explore the essential responsibilities plan fiduciaries carry under ERISA—including the duties of loyalty, prudence, and diversification—and how these principles translate into practical investment oversight.

As we approach mid-year, we'll also examine the evolving regulatory landscape and what it means for fiduciary oversight, including the latest guidance from the Department of Labor and key provisions from the SECURE Act and SECURE 2.0.

Join us for actionable insights to help you meet your fiduciary obligations with confidence including:

- Understand and apply the core fiduciary duties under ERISA to strengthen fiduciary governance
- How to align investment decisions with plan objectives
- Learn how recent legislation and regulatory updates will help to minimize liability

Watch Now
