

# FIDUCIARY CALENDAR

OBJECTIVE	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
<b>Goal Setting</b> Establish fiduciary committee goals for the year	ESTABLISH FIDUCIARY COMMITTEE GOALS		COMMITTEE MEETING TOPICS OF INTEREST	COMMITTEE MEETING	COMMITTEE MEETING MINUTES				COMMITTEE MEETING	COMMITTEE MEETING MINUTES		
<b>Fiduciary Governance</b> Review committee roles & oversight; conduct committee meetings	FIDUCIARY TRAINING PRESENTATION											
<b>Investment Oversight &amp; Monitoring</b> Periodic review of investment policies and performance			INVESTMENT POLICY STATEMENT REVIEW		PLAN INVESTMENT REVIEW					PLAN INVESTMENT REVIEW		
<b>Documentation &amp; Records Management</b> Documentation of due diligence and plan records				ANNUAL FIDUCIARY CHECKLIST								
<b>Fee &amp; Service Reviews</b> Provider management and evaluation of fees for reasonableness												PROVIDER FEE ANALYSIS AND COST SAVINGS IDEAS