



Best Practices for Investment Committees (Wiley Trading)

Rocco DiBruno

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An indispensable guide to avoiding the legal and financial pitfalls and of retirement plan investment

While it has always been true that a well-staffed and managed investment committee is key to the success of a corporate retirement plan, in today's increasingly complex and litigious world it is also a matter of survival. But what constitutes a prudent investment committee selection and operating process? How should a committee be selected and governed? How much reliance should a committee place on outside consultants? Written by an author with extensive, in-the-trenches experience, this book provides complete answers to these and all vital questions concerning the creation, staffing and management of a highly-adept investment committee, along with expert advice and guidance on serving on an investment committee and ensuring that your 401(K) investment program is sound, efficient and in complete compliance.

- Offers expert advice and guidance on how to serve successfully on an investment committee, facilitate effective management, design and implement a robust investment policy and much more
- Packed with sample documents, forms, templates, checklists, diagrams and other valuable, ready-to-use resources
- Features numerous real-world examples drawn from the author's years of experience as an accredited investment

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