



The TruePlan Fiduciary Advantage: Annual Fiduciary Fest

TruePlan clients get exclusive access

TruePlan's annual **Fiduciary Fest** is an exclusive virtual conference for our clients. In one comprehensive experience, gain in-depth fiduciary education, timely updates and actionable insights.

What is TruePlan's Fiduciary Fest?

A premier virtual event dedicated to **strengthening fiduciary governance and compliance**. Unlike standard onboarding and ad hoc support, Fiduciary Fest provides a **deep dive into issues that matter most** to plan sponsors and fiduciary committees.

WHAT YOU'LL GAIN:

- **Core fiduciary duties refreshers:** Reinforce the fundamentals and best practices under ERISA.
- **Governance document review:** Ensure your committee charters, bylaws and policies remain current.
- **Regulatory and litigation updates:** Stay informed on recent court cases and DOL guidance.
- **Topical sessions:** Explore emerging fiduciary issues and real-world case studies.
- **Expert insights:** Hear from leading attorneys and advisors on risk mitigation strategies.
- **Engage and ask:** Interactive Q&A ensures your opportunity to question fiduciary experts on topics that are valuable to your plan.

WHY IT MATTERS

Fiduciary responsibilities evolve each year. **Fiduciary Fest** helps committees:

- maintain compliance and reduce risk;
- strengthen governance processes; and
- make informed, prudent decisions.

TruePlan's Fiduciary Advantage is more than education. It's **confidence, clarity and a premier fiduciary experience** that equips your committee for success.

Contact us today to learn more about the perks included within The TruePlan Fiduciary Advantage.

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