

HEALTH WEALTH CAREER

FIDUCIARY MANAGEMENT

THE PROS

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INTRODUCTION TO FIDUCIARY MANAGEMENT

WHAT?

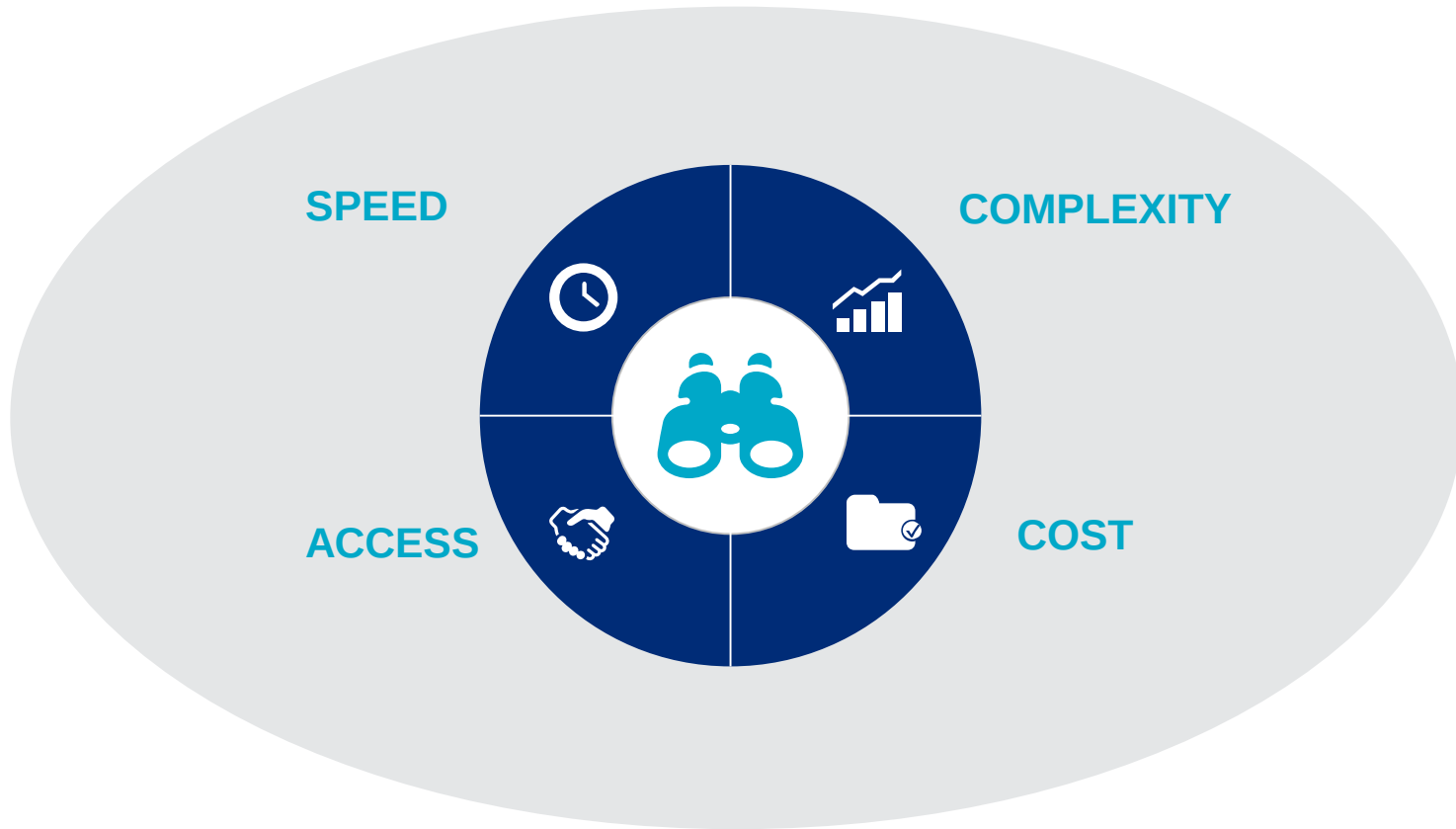
WHO?



WHY?

HOW?

INVESTMENT CHALLENGES FACING TRUSTEES



FIDUCIARY MANAGEMENT ADDRESSES THESE
CHALLENGES THROUGH DELEGATION

HOW CAN DELEGATION HELP?

**PROVIDES ACCESS
TO MORE
SOPHISTICATED
APPROACHES**



**PASSES SPECIFIC
TASKS TO EXPERTS
WHO HAVE GREATER
TIME AND
RESOURCES**



**SPEEDIER
IMPLEMENTATION OF
INVESTMENT
CHANGES**



STOP THE PRESS!!

FIDUCIARY MANAGEMENT IS OFTEN THE LOWEST COST APPROACH

HAS FIDUCIARY MANAGEMENT DELIVERED?

	ASSET GROWTH	FUNDING LEVEL
Fiduciary approach	71%	83%
Pre Fiduciary Strategy	51%	73%
Difference	20%	10%

Performance – March 2010 to Dec 2014

WHAT DO THE USERS OF FIDUCIARY MANAGEMENT SAY?

WOULD YOU RECOMMEND FIDUCIARY MANAGEMENT

YES - 97%

HOW COMMITTED ARE YOU TO FIDUCIARY MANAGEMENT?

THOROUGHLY COMMITTED – 94%

HOW SATISFIED ARE YOU WITH THE OVERALL PERFORMANCE OF YOUR FIDUCIARY MANAGEMENT ARRANGEMENT?

5 out of 6

Fiduciary Management Client Satisfaction Survey conducted by Buck Consulting and Spence Johnson (2014)

SO WHY FIDUCIARY MANAGEMENT?

SHOULDN'T THE QUESTION BE WHY NOT?

MAKE
TOMORROW,
TODAY

