Effective Planning, Creation and Implementation of Your Trust (Sept 29, 2015)

Facilitators:

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TIME	AGENDA ITEMS
9:00 a.m. - 9:15 a.m.	**Preliminaries** ▪ Introductions ▪ Housekeeping ▪ Review Agenda
9:15 a.m. - 10:30 a.m.	**Trusts – Basic Concepts** ▪ Different Trust Models
10:30 – 10:45 a.m.	**HEALTH BREAK**
10:45 a.m. – 12:00 p.m	**Trusts- Roles and Responsibilities** ▪ Choice of Trustees ▪ Other Considerations
12:00 – 1:00 p.m.	**LUNCH**
1:00 – 1:30 p.m.	**Investment Planning- Community Readiness** ▪ Establishing Effective Communications ▪ Comprehensive Community Planning ▪ Getting Your Team Together
1:30 – 2:15 p.m.	**Investment Basics** ▪ Understanding Risk and Return ▪ Understanding the Financial Affordability of Your Trust
2:15 - 2:30 p.m.	**HEALTH BREAK**
2:30 – 3:45 p.m.	**Other Investment Related Responsibilities** ▪ Developing the Investment Policy and Content ▪ Portfolio Structure Considerations ▪ The Investment Manager Search and Selection Process ▪ Performance Measurement, Monitoring and Reporting
3:45 - 4:00 p.m.	**Course Summary and Wrap-Up**