



Aon Fiduciary Academy

Interactive and Engaging Fiduciary Training



Our Unique Approach

A solid approach to fiduciary governance includes understanding the breadth of your obligations as a fiduciary. Aon's online fiduciary training program, Aon Fiduciary Academy, goes beyond a discussion of the law and emphasizes the practical implications of ERISA.

The training is divided into two parts, each of which takes about 45 – 60 minutes. Part one focuses on the specific fiduciary obligations under ERISA, while part two builds on those basic concepts and describes best practices for fiduciary committees.

Scenario-Based Training

Aon Fiduciary Academy is designed to be interactive. Throughout the training, the committee member will be presented with real-life examples of issues facing fiduciaries today and asked to consider how they would act in these situations. These exercises help illustrate the relevance and importance of the topics.

Aon Fiduciary Academy is also user-friendly and flexible:

- Each committee member can take the training on their own schedule.
- Committee members can pause the training if needed, and re-start where they left off, allowing for easier integration into a busy workday.
- The training is easy to access on a computer or mobile device.
- Training is always available for new committee members.
- Committee members can review the training as often as needed to refresh their knowledge.
- Organizations can monitor which committee members have completed the training.
- A certificate of completion is provided at the end of the training.

Topics Covered

Basic Concepts and Terminology <ul style="list-style-type: none">• Plan assets• Key fiduciary roles• Settlor versus fiduciary	Fiduciary Best Practices <ul style="list-style-type: none">• Committee structure and governance• Overseeing investments• Overseeing administration• Monitoring expenses
Risk Mitigation Strategies	Core Fiduciary Duties and Prohibited Transactions
ERISA Background and Perspective	



About Aon

Aon plc (NYSE: AON) exists to shape decisions for the better — to protect and enrich the lives of people around the world. Our colleagues provide our clients in over 120 countries and sovereignties with advice and solutions that give them the clarity and confidence to make better decisions to protect and grow their business.

Follow Aon on [LinkedIn](#), [Twitter](#), [Facebook](#) and [Instagram](#). Stay up-to-date by visiting the [Aon Newsroom](#) and sign up for News Alerts [here](#).

aon.com

© 2024 Aon plc. All rights reserved.

Consulting services provided by Aon Consulting, Inc. ("ACI"). The information contained herein is given as of the date hereof and does not purport to give information as of any other date. The delivery at any time shall not, under any circumstances, create any implication that there has been a change in the information set forth herein since the date hereof or any obligation to update or provide amendments hereto.

This document is not intended to provide, and shall not be relied upon for, accounting, legal or tax advice or investment recommendations. Any accounting, legal, or taxation position described in this presentation is a general statement and shall only be used as a guide. It does not constitute accounting, legal, investment, and/or tax advice and is based on ACI's understanding of current laws and interpretation.

This document is intended for general information purposes only and should not be construed as advice or opinions on any specific facts or circumstances. The comments in this summary are based upon ACI's preliminary analysis of publicly available information unless otherwise noted. The content of this document is made available on an "as is" basis, without warranty of any kind. ACI disclaims any legal liability to any person or organization for loss or damage caused by or resulting from any reliance placed on that content. ACI reserves all rights to the content of this document. No part of this document may be reproduced, stored, or transmitted by any means without the express written consent of ACI.

Contact Us

To learn more about Aon Fiduciary Academy, please reach out to Aon_Fiduciary_Academy@aon.com, or you can directly contact:

Leslie Smith

+1 973 463 6189

leslie.smith@aon.com

Rhonda Jinks

+1 770 690 7611

rhonda.c.jinks1@aon.com