



# Fiduciary Investment Review Meeting Summary

Company Name

Meeting Date mm/dd/yy

## Attendees

	Attendee Name	Attendee Title
Committee Members		
Other		
RPAG Firm Name		
Other		

## Administrative Review

Prior Meeting Minutes :

Service Plan :

Signed Investment Policy Statement on file with **RPAG Firm Name**:  Yes  No.

## Market Review

## Scoring Process

## Scorecard as of 3/31/2024

## Fund Review

## Additional Fund Discussion

## Items to be Discussed in Subsequent Meetings

## Discussion of Fiduciary Topics

Fiduciary Diagnostic:

Education Modules:

Documentation Modules:

## Additional Comments

## Online Report Access

Available at **www.**

Username:

Password:



# Fiduciary Investment Review Meeting Summary

\*Login information is for main contact. If information is needed for another account, please contact [name@company.com](mailto:name@company.com)

## Pending Action Items

**Fund Changes** initiated by

[RPAG Firm Name](#) Support  [RPAG Firm Name](#) Consultant  Recordkeeper

This material contains an assessment of the market and economic environment at a specific point in time and is not intended to be a forecast of future events, or a guarantee of future results. Forward-looking statements are subject to certain risks and uncertainties. Actual results, performance, or achievements may differ materially from those expressed or implied. Information is based on data gathered from what we believe are reliable sources. It is not guaranteed by Retirement Plan Advisory Group as to accuracy, does not purport to be complete and is not intended to be used as a primary basis for investment decisions. It should also not be construed as advice meeting the particular investment needs of any investor. The indices mentioned are unmanaged and cannot be directly invested into. Past performance does not guarantee future results.

[\[SECURITIES DISCLOSURE\]](#) ACR# 6545999 04/24