



Fiduciary Investment Review Meeting Summary

Company Name

Meeting Date mm/dd/yy

Attendees		
Committee Members	Attendee Name	Attendee Title
Other		
RPAG Firm Name		
Other		
Administrative Review		
Prior Meeting Minutes <input type="checkbox"/> :		
Service Plan <input type="checkbox"/> :		
Signed Investment Policy Statement on file with RPAG Firm Name: <input type="checkbox"/> Yes <input type="checkbox"/> No.		
Market Review		
Scoring Process		
Scorecard as of 3/31/2025		
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:



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*Login information is for main contact. If information is needed for another account, please contact name@company.com

Pending Action Items

Fund Changes initiated by

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

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