



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 6/30/2024

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:



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

Pending Action Items

Fund Changes initiated by

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

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[\[SECURITIES DISCLOSURE\]](#) ACR# 6799985 07/24