

2021 Online workshops



Advanced Fiduciary Duties Module II

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ICTS is hosting an **ONLINE** Advanced Fiduciary Duties Module II workshop



18 August 2021



from 09h00
until 16h00



cost per delegate is
R3 510.00 ex VAT

AGENDA

Retirement Funds - a recap

- What is a retirement fund?
- Different types of retirement funds
- Taxation of retirement funds
- Taxation examples when members exit a retirement fund
- Annuities
- Different types of annuities

Trustees - fiduciary duties and governance

- What is a trustee?
- Trustees' fiduciary duties
- Introduction to governance
- What is good governance?
- King IV and Pf130

Risk benefits

- Concept of group cover
- Group life assurance
- Approved and unapproved life assurance
- Disability insurance
- Generic terms and conditions
- Free cover limits
- Medical underwriting process
- Other insurance products

Administration

- Managing service providers
- Administration responsibility of the board, employer and administrators
- Service level agreements



Programme Supported by INSETA