

WE MAKE ERISA FIDUCIARIES SMARTER

Ever had a REALLY important job to do without proper training? Not anymore.

PREVIEW A COURSE CHAPTER ([HTTPS://LEARN.FIDUCIARYU.COM/ENROLL/439073?](https://learn.fiduciaryu.com/enroll/439073?ET=FREE_TRIAL)
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An Online Learning *Community* For ERISA Fiduciaries



EXPERT INSTRUCTION

Created by Greenspring Advisors (<http://www.greenspringadvisors.com/>), a leading retirement plan advisory firm and the 2018 PLANSPONSOR Retirement Plan



RAPID LEARNING

In just about every endeavor, lack of knowledge and training almost always leads to sub-optimal outcomes and poor



RISK MANAGEMENT

ERISA litigation is increasing and the DOL views regular fiduciary education as a critical component of a good governance process to demonstrate prudence.

Adviser of the Year
(<https://www.planadviser.com/awards/2018-plansponsor-retirement-plan-adviser-year/?pid=44502>).

performance. With Fiduciary U™, you get smart, fast.



SELF-PACED & CONVENIENT

If you learn at a fast pace you can develop competency quickly. If you learn at a slower pace you can absorb the information without being pushed ahead too quickly.

With 24/7 access, you can complete courses whenever it works best for you.

Are you an early riser? Study in the morning. Unpredictable hours? Weave in the training around your other priorities.



CONTINUING EDUCATION

Courses provide CE credit for a number of designations, certifications and licenses from organizations like the HR Certification Institute® (HRCI®), the Society for Human Resource Management (SHRM) and Certified Financial Planner Board of Standards, Inc.



AFFORDABLE

Fiduciary U™ is a cost-effective and valuable investment for your company and your committee members, especially when compared to the potential cost of a settlement agreement with the DOL or an ERISA lawsuit. And our Company Subscriptions are perfect for training your entire retirement plan committee and plan support staff.

Annual Subscription Pricing

FOR INDIVIDUALS*

FOR COMPANIES**

ERISA FIDUCIARY TRAINING	FIDUCIARY U™	ERISA FIDUCIARY TRAINING	FIDUCIARY U™
\$39 / Month	\$99 / Month	\$149 / Month	\$199 / Month
✓ 1 Student	✓ 1 Student	✓ Up to 10 Students	✓ Up to 10 Students
✓ Single Course	✓ Unlimited Courses & Content	✓ Single Course	✓ Unlimited Courses & Content
✓ 12-Month Subscription	✓ 12-Month Subscription	✓ 12-Month Subscription	✓ 12-Month Subscription
✓ CE Credit	✓ CE Credit	✓ CE Credit	✓ CE Credit
	✓ Insider Research & Exclusive Content		✓ Insider Research & Exclusive Content
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Downloadable Tools & Checklists

✓ Access to Fiduciary U™
Helpdesk (Coming Soon)

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Downloadable Tools & Checklists

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*Subscriptions are for 12-month access for 1 individual student and renews automatically each year unless canceled.

**Subscriptions are for 12-month access for up to 10 individual students as designated by the company and renews automatically each year unless canceled. Only available to companies for use with internal retirement staff (e.g. committee members, HR, payroll, etc.)

Who Should Subscribe To Fiduciary U™?



Retirement Committee Members

Plan fiduciaries who need formal training to improve decision-making while minimizing personal and corporate liability.



Retirement Plan Support Staff

HR, Payroll or Accounting staff who work with plans on a day-to-day basis and want to learn more to avoid expensive errors.



Industry Professionals

Advisors, auditors, TPAs, recordkeepers, or anyone else who wants to enhance their knowledge, sharpen their skills and meet CE requirements.

Meet Your Instructor



Josh Itzoe, CFP®, AIF® is a Co-Founder, Partner & Managing Director of Greenspring Advisors (<http://www.greenspringadvisors.com/>) and leads the firm's Institutional Client Group, one of the country's most well-known retirement plan consulting firms and the 2018 PLANSPONSOR Retirement Plan Adviser of the Year (Small Team) (<https://www.planadviser.com/awards/2018-plansponsor-retirement-plan-adviser-year/?pid=44502>).

He's also the author of *Fixing the 401(k): What Fiduciaries Must Know (And Do) To Help Employees Retire Successfully* (<https://www.amazon.com/exec/obidos/ASIN/1934937177/flatwave-20>), a frequent



industry speaker, and has been quoted extensively in publications such as The Wall Street Journal, SmartMoney Magazine, Kiplinger's Retirement Report, InvestmentNews,

PLANADVISER and PLANSPONSOR.

From 2016-2018 he has been named a Financial Times Top 401 Retirement Advisor (<https://www.ft.com/content/8bd375be-9a24-11e8-88de-49c908b1f264>) and was previously nominated for the Top 100 Most Influential People in Defined Contribution survey by 401kWire. Josh is a CERTIFIED FINANCIAL PLANNER™ and Accredited Investment Fiduciary®.

Featured Courses



(/erisa-fiduciary-training)

ERISA FIDUCIARY TRAINING (/ERISA-FIDUCIARY-TRAINING)

Created in consultation with Fred Reish (<https://www.drinkerbiddle.com/people/r/r/eish-fred>) from Drinker Biddle, this course is designed to help retirement plan fiduciaries have a full understanding of what it means to be an ERISA fiduciary and to become better prepared to face their duties and manage both the corporate and personal liability that has arisen due to increased scrutiny from the Department of Labor and the rapidly growing number of 401(k) and 403(b) lawsuits in the marketplace.

LEARN MORE (/ERISA-FIDUCIARY-
TRAINING)

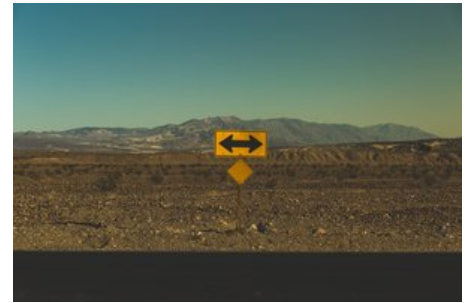


(/automatic-plan-design)

USING BEHAVIORAL FINANCE TO DRIVE RETIREMENT OUTCOMES (/AUTOMATIC- PLAN-DESIGN)

This course provides an in-depth look at behavioral finance concepts, social science and investment research as well as fiduciary trends and best practices for why plans should adopt automatic plan design features in order to drive successful retirement outcomes for employees.

LEARN MORE (/USING-BEHAVIORAL-
FINANCE-TO-DRIVE-OUTCOMES)



(/developing-and-properly-using-an-ips-
to-guide-investment-decisions)

DEVELOPING AND PROPERLY USING AN IPS TO GUIDE INVESTMENT DECISIONS (/DEVELOPING-AND-PROPERLY- USING-AN-IPS-TO-GUIDE- INVESTMENT-DECISIONS)

This course discusses the importance of a properly designed and well-constructed investment policy statement (IPS) as a tool to help ERISA fiduciaries demonstrate that a prudent process has been followed when selecting and monitoring plan investments. The course also reviews best practices that can help ensure the IPS is creating less fiduciary risk, rather than additional risk.

COMING SOON... (/DEVELOPING-AND-
PROPERLY-USING-AN-IPS-TO-GUIDE-
INVESTMENT-DECISIONS)

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