

FOR TRUSTEES, BOARDS AND NOT-FOR-PROFIT LEADERS

Investment Governance for Not-For-Profit and Charitable Organisations

Improve stewardship. Strengthen fiduciary oversight. Support better decisions.

**FIDUCIARY
STEWARDSHIP
OVERSIGHT****2-DAY COURSE**

CLASSROOM | ONLINE | BLENDED

Better investment governance for mission-focused organisations.

A practical course for trustees, directors and executives responsible for institutional funds. It focuses on governance and fiduciary oversight rather than investment selection alone, helping boards establish clear responsibilities, sound investment policy, disciplined oversight of advisers and better decision-making.

WHAT PARTICIPANTS WILL COVER

Fiduciary duties, mission & roles

Clarify Board responsibilities, stewardship obligations, decision rights and the relationship between mission and investment governance.

Investment policy & risk oversight

Develop disciplined policy settings, risk appetite, objectives, liquidity considerations and decision frameworks.

Managers, advisers & conflicts

Strengthen selection, delegation, performance oversight, service-provider governance and conflict management.

Reporting, review & decisions

Use better reporting, review disciplines and Board routines to support sound, evidence-based investment decisions.

Practical learning with optional tools and take-away resources.

Applied investment governance

Grounded in practical stewardship, fiduciary decision-making and Board oversight frameworks.

Optional AI-based support tools

Optional access to AI-based governance and decision-support tools for policy review, reporting, analysis and meeting preparation.

Downloads & support documents

Comprehensive downloadable guides, templates, checklists and support documents for ongoing workplace use.



Let's discuss your investment governance learning priorities.

The course can be tailored to your mission, investment structure, advisers and governance framework.

Start a conversation ->admin@shoreline-asia.com