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for trustees and their financial advisers when considering the investment strategy of a trust. These include:

- the financial objectives of the trust
- the tax status of the trust and its beneficiaries
- the permissible investments available to the trustees
- the legal requirements of the trust provisions.

Each area needs to be considered in

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trustees' investment knowledge and to provide them with the necessary confidence and competence to adopt an advanced level of investment governance for their scheme, The Trustee Guide to Investment is a uniquely and refreshingly objective and practical guide to the ever expanding range of markets,

The Trustee Guide to Investment

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Trustee guidance | The Pensions Regulator

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The essential trustee: what you need to know, what you ...

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The Trustee Guide To Investment

ESG & Stewardship: A practical guide to trustee duties Recent changes to the Occupational Pension Schemes (Investment) Regulations 2005 mean it is now vital that trustees of all schemes understand and include ESG factors and stewardship approaches in their investment decision-making.

The Trustee Guide to Investment is a unique and refreshingly practical guide to the expanding range of markets, investments, tools and techniques to which pension scheme trustees must now become familiar.

More than 80% of the financial assets in the United States fall under the purview of a trustee. That's a big responsibility for an estimated 1% (around 1.5 million people) of the U.S. working population charged with overseeing investments for millions and millions of beneficiaries, public sector, and non-profit organizations. In a world proliferated by investment products, increasingly dominated by indexes, faced—particularly in the pension world—with increasing liabilities, more regulation, and a growing number of social and sustainability objectives, what's a trustee to do? The Trustee Governance Guide is here to help guide today's board trustee through the brave new world of 21st century investing. The book focuses on the critical aspects of the Five Imperatives: Governance, Knowledge, Diversification, Discipline, and Impact. Based on more than a decade of research, practice, and discussions with many key decision makers and influencers across the industry, this book addresses the many topics related to better governance, greater mission-driven financial performance, and impact. The questions the book addresses include:

- What is good governance, how do we know it when we see it, and why does it matter?
- How much knowledge is necessary to be a competent board member?
- How big should my endowment be?
- What are the key elements of a diversified portfolio?
- How much does cost matter?
- What's the difference between socially responsible and ESG investing?
- Can I focus on sustainability and still be a good fiduciary?

This book provides a way for boards to improve and benchmark their own governance performance alongside their peers, and uniquely covers related investment topics in each chapter.

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This is the definitive guide for pension fund trustees and their advisors, offering jargon-free advice on pensions law, the role of the trustee, and how that has changed in light of amendments to the law as at September 2006.

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