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This guide has been written to help trustees (and sponsoring companies) of defined benefit pension schemes set their investment objectives. Setting the investment objectives should be the first stage in reviewing a scheme's investment

Trustees Guide to Investment Objectives v1

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The trustees must also review the investments on a regular basis to ensure they remain suitable for the trust. Other factors. In addition to the standard investment criteria, the trustees should also consider the following: The nature and terms of the trust; Their investment powers; The size of the fund; The need for income or capital growth or both

Trustee investment - Techzone

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The trustee acts as the legal owner of trust assets, and is responsible for handling any of the assets held in trust, tax filings for the trust, and distributing the assets according to the

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terms of the trust. Both roles involve duties that are legally required.

Executor and Trustee Guidelines - Inheritance - Fidelity

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What is investment consultancy? Under the investment consultant advisory governance model, the strategic investment decisions are taken...

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The previous Act, the Trustee Investments Act 1961, imposed limitations on the differing types of investment that trustees could select. Now trustees can make an investment of any kind, as if they were absolutely entitled to the trust assets. This power is subject to any restrictions imposed in the trust deed.

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INVESTMENT FOR TRUSTEES - Old Mutual Wealth

The rules surrounding trustee investments are complex. As a trustee you have many responsibilities to look after the needs of your beneficiaries and to diversify assets. The best way to achieve this with certainty is to take advice from regulated experts in Investment Management for trustee investments.

Trustee Investments - all you need to know

The trade body's guide sets out what the legislation requires and by when, both general principles and more detailed possible considerations for trustees to produce good statements, the specific considerations around voting behaviour disclosures, and 'top tips' for investment and responsible investment communications.

PLSA publishes guide on trustee investment disclosure duties

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- The Trustee Act 2000, and most modern trust instruments, give trustees a wide power to invest in such investments as they think fit. For the purpose of this briefing we assume that the trustees have this wide power of investment, although in practice it will be necessary to check the trust deed for any specific restrictions. 2.

Trustees' duties and powers when making investment decisions

If state law allows the trustee to delegate investment decisions or asset management, that does not mean the trustee can avoid responsibility entirely. The laws applicable to trustees typically provide some safeguards for beneficiaries when a trustee delegates these duties to a third party.

Trustee Investment Duties Trust Administration

A trustee is any type of person or organization that holds the

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legal title of an asset or group of assets for another person, referred to as the beneficiary. A trustee is granted this type of legal...

Trustee Definition - investopedia.com

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Trustees must strive to improve upon their skill, expertise and organisational effectiveness in determining and monitoring a scheme's investment strategy, because simplicity in many aspects of trusteeship and investment are continually giving way to increased complexity.

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