Governance in Investment Committees Training Course

Professional Development Training Course Outline

Category	Corporate Governance	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

Effective governance in investment committees is pivotal to ensuring strategic alignment, risk mitigation, and sustainable value creation within organizations. Governance in Investment Committees Training Course provides a comprehensive framework to understand the principles, structures, and responsibilities that underpin high-performing investment committees. Participants will explore critical concepts such as fiduciary responsibilities, regulatory compliance, investment policies, risk management, and decision-making processes that enhance organizational transparency and accountability. Through interactive discussions and case studies, participants will gain actionable insights into optimizing investment committee operations to meet evolving market demands.

In today's dynamic financial environment, investment committees face increasing scrutiny regarding their governance standards and performance outcomes. This course emphasizes the integration of best practices, ethical standards, and strategic oversight to foster sound investment decisions. By leveraging practical examples and industry benchmarks, participants will strengthen their understanding of committee governance frameworks, stakeholder engagement, and performance evaluation metrics. The course equips professionals with the tools to implement governance strategies that drive long-term organizational growth, investor confidence, and regulatory compliance.

Programme Curriculum

Governance in Investment Committees Training Course

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Course Objectives

1. Understand the fundamentals of governance in investment committees
2. Examine fiduciary duties and legal responsibilities for committee members
3. Develop effective investment policy frameworks
4. Evaluate risk management strategies within investment decision-making
5. Apply ethical principles in committee governance
6. Enhance committee decision-making processes using best practices
7. Strengthen communication and stakeholder engagement skills
8. Analyze performance metrics for committee effectiveness
9. Identify regulatory compliance requirements and standards
10. Implement governance structures to support strategic organizational objectives
11. Leverage data analytics in investment committee reporting
12. Integrate ESG considerations in investment governance
13. Develop action plans to improve committee efficiency and accountability

Organizational Benefits

- Enhanced decision-making efficiency in investment committees
- Improved compliance with regulatory standards
- Strengthened stakeholder confidence and trust
- Reduced operational and reputational risks
- Implementation of structured governance frameworks
- Increased transparency and accountability

- Better integration of ESG considerations
- Optimized investment performance
- Enhanced team collaboration and communication
- Continuous improvement culture in governance practices

Target Audiences

- Investment committee members
- Board directors and trustees
- Senior finance professionals
- Risk management officers
- Compliance officers
- Portfolio managers
- Governance and audit professionals
- Financial advisors

Course Duration: 5 days

Course Modules

Module 1: Governance Fundamentals

- Overview of investment committee roles and responsibilities
- Governance frameworks for effective oversight
- Best practices in committee operations
- Importance of transparency and accountability
- Case Study: Evaluating governance failures in a public fund
- Practical exercises for governance framework application

Module 2: Fiduciary Duties and Legal Responsibilities

- Understanding fiduciary responsibilities
- Legal obligations for committee members
- Liability management strategies
- Compliance with national and international regulations
- Case Study: Legal consequences of breach of fiduciary duty
- Tools for documenting and monitoring committee actions

Module 3: Investment Policy Development

- Frameworks for robust investment policies
- Aligning policies with organizational objectives
- Policy review and approval processes
- Incorporating risk tolerance and asset allocation strategies
- Case Study: Revising an outdated investment policy for effectiveness
- Practical exercise: Drafting a policy framework

Module 4: Risk Management in Investment Decisions

- Identifying and assessing investment risks
- Risk mitigation strategies
- Scenario analysis and stress testing
- Risk reporting and monitoring processes
- Case Study: Crisis management in a volatile market
- Risk assessment template exercise

Module 5: Ethical Governance Practices

- Principles of ethical decision-making
- Addressing conflicts of interest
- Promoting transparency and integrity
- Ethical review processes for investment decisions
- Case Study: Ethical dilemmas in committee decision-making
- Role-play: Navigating ethical challenges

Module 6: Committee Decision-Making Excellence

- Structured decision-making models
- Consensus-building techniques
- Evaluating investment proposals
- Use of analytics and data in decision-making
- Case Study: Improving committee decisions in a multi-asset portfolio
- Exercise: Decision simulation workshop

Module 7: Stakeholder Engagement and Communication

- Effective reporting to stakeholders
- Managing investor and board expectations
- Communication strategies for complex information
- Feedback mechanisms for committee improvement
- Case Study: Engaging stakeholders in a high-stakes decision
- Practical exercise: Preparing stakeholder reports

Module 8: Performance Evaluation and Continuous Improvement

- Metrics for measuring committee effectiveness
- Audit and review processes
- Benchmarking against industry standards
- Continuous improvement strategies
- Case Study: Evaluating a committee's performance post-restructuring
- Exercise: Designing a performance dashboard

Training Methodology

- Interactive lectures with industry insights
- Hands-on workshops and simulations
- Case study analysis and group discussions
- Role-play scenarios for ethical dilemmas
- Practical exercises for policy and framework development
- Performance evaluation exercises

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call *+254769199797*

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Online	$1,000
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

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